

24TH ANNUAL
**ESTATE PLANNING, GUARDIANSHIP
AND ELDER LAW CONFERENCE**

August 4–5, 2022
Moody Gardens ■ Galveston, Texas
Live Webcast August 4–5

Earn up to 14.25 Hours of Credit Including 4.75 Hours of Ethics Credit and 4.00 Hours of Guardianship –
Approved in TX, CA, LA, OK, and PA (Hours Vary by State)

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

Earn up to 17.00 Hours of Texas Certified Professional Accounting Credit and National Accounting CPE Credit (in-person only)

Certified Financial Planner (CFP) Professional Accreditation Approved; ICB Certified Trust and Financial Advisor (CTFA) Credit Expected;
TX Guardianship Certification Board (GCB) Expected



TX NAELA MEMBERS – COME A DAY EARLY!

TEXAS NAELA SUMMER CONFERENCE

Open to TX NAELA Members ONLY

August 3, 2022
Moody Gardens ■ Galveston, Texas
Live Webcast August 3

Earn Up To 3.50 Hours of Credit Including 0.50 Hour of Ethics Credit

2022

TEXAS NAELA SUMMER CONFERENCE

Open to TX NAELA Members ONLY

August 3, 2022 ■ Moody Gardens ■ Galveston, Texas

Earn Up To 3.50 Hours of Credit Including 0.50 Hour of Ethics Credit

Times listed are Central Standard

WEDNESDAY MORNING, AUG. 3, 2022

10:30 a.m. Registration Opens

11:00 a.m. Board Meeting

THANK YOU TO OUR
LUNCHEON SPONSOR



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

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

WEDNESDAY AFTERNOON

Presiding Officer:
John R. McNair, J. McNair Dallas Law
P.C., Dallas, TX

1:05 p.m. Welcoming Remarks
John R. McNair, J. McNair Dallas Law P.C., Dallas, TX

1:15 p.m. .75 hr

Medical Necessity

Tips and tricks to evaluate clients for medical necessity including issue spotting, formal third-party assessments, and the appeals process.

Meredith Ann Sullivan, Farrell & Johnson PLLC,
Austin, TX
Catherine Vergara, CareFor, Austin, TX

2:00 p.m. .75 hr

Child Support and Public Benefits

Review special needs considerations and planning tools that must be addressed in family law matters. Hear a discussion on specific language for provisions in both the family law orders and special needs trusts to maintain eligibility for government benefits while obtaining indefinite child support for the adult child with disabilities.

Michele Kosoy Goldberg, Attorney at Law,
Bellaire, TX

Materials By:
Keith D. Maples, Noelke Maples St. Leger Bryant,
LLP, Austin, TX

2:45 p.m. .75 hr

MERP: Post-Death Practical Tips

Hear practical tips for handling Medicaid Estate Recovery Program claims after the death of a Medicaid recipient, including useful contacts, choice of probate proceedings, and unresolved issues.

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

3:30 p.m. 15-Minute Break

3:45 p.m. .50 hr ethics

Care Managers and Attorneys: Great Bedfellows and Ethical Issues

Elder Law attorneys and care managers work together to solve client problems. Explore where to locate a care manager, how they can assist the elder law attorney in day-to-day practice, and what ethical issues may arise in working with a care manager.

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

4:15 p.m. .75 hr

How to Craft the "Perfect" Power of Attorney: The Never-ending Search

This presentation provides a practical guide to the pitfalls of powers of attorney and the possible solutions for various family and financial needs. Also review the best practices in ancillary documents when planning for incapacity.

Jessica Kludt, Townsend Allala, Coulter & Kludt,
PLLC, El Paso, TX
Marilyn G. Miller, Marilyn G. Miller, Attorney at Law,
Dripping Springs, TX

Materials By:
Christopher Towns Hodge, Langley & Banack,
San Antonio, TX

5:00 p.m. Adjourn to Business Meeting
and Election of Officers

Webcast attendees please refer to your email for the Zoom link and meeting information.

WEDNESDAY EVENING

5:30 p.m. Pick Up Dinner

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

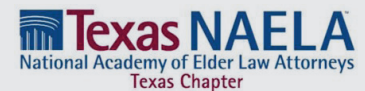
5:50 p.m.

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

THANK YOU TO OUR
DINNER SPONSOR



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.

24TH ANNUAL

ESTATE PLANNING, GUARDIANSHIP AND ELDER LAW CONFERENCE

August 4–5, 2022 ■ Moody Gardens ■ Galveston, Texas

Earn up to 14.25 Hours of Credit Including 4.75 Hours of Ethics Credit and 4.00 Hours of Guardianship – Approved in TX, CA, and PA;
Expected in LA and OK (Hours Vary by State)

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

Earn up to 16.00 Hours of Texas Certified Professional Accounting Credit and National Accounting CPE Credit (in-person only)

Certified Financial Planner (CFP) Professional Accreditation Approved; ICB Certified Trust and Financial Advisor (CTFA) Credit Expected;
TX Guardianship Certification Board (GCB) Expected

Times listed are Central Standard

THURSDAY MORNING, AUG. 4, 2022

Presiding Officer:

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

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

Includes continental breakfast.

THANK YOU TO OUR
BREAKFAST SPONSOR



8:20 a.m. Welcoming Remarks

8:30 a.m. .50 hr

You Never Give Me Your Money, You Only Give Me Your Funny Paper: Adventures in Will Drafting

Practice pitfalls, stupid testator tricks, and everything else that can go wrong before a will gets successfully drafted, executed, and probated. Join the speaker on a tour of cringe. Learn a thing or two about how to stop the damage. But no promises.

Dianne Reis, Attorney at Law, Plano, TX

9:00 a.m. .75 hr

Medicaid Update

Latest developments affecting planning and applications for Medicaid to pay for nursing home care and home care.

H. Clyde Farrell, Farrell & Johnson PLLC, Austin, TX
Meredith Ann Sullivan, Farrell & Johnson PLLC,
Austin, TX

Co-Author:

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

Materials By:

Julie Ann Ezell-Perez, Ezell & Ezell, PLLC,
Harlingen, TX
Benecia Flores, Petrosewicz Law Firm, P.C.,
Richmond, TX

9:45 a.m. .75 hr

Paying for Home Care and Arranging Home Care

Most clients want to stay at home for as long as possible as they age or if they become disabled. Funding care at home requires understanding of the different rules for home care using Veterans Benefits, Medicaid, Medicare, reverse mortgages, and long-term care insurance, as well as how the complexity of the interplay between the programs. A discussion of the wait time or interest list of the programs, as well as the approximate hours of benefits will be included.

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

10:30 a.m. 15-Minute Break to Visit Exhibitors

10:45 a.m. .75 hr

Utilizing Business Entities to Protect Your Business Assets

Individuals all too often fail to properly separate their personal affairs from their family business, and this can be disastrous when it comes to asset protection and wealth preservation. The proper use of corporate entities can help protect your business related assets and wealth from various types of creditors — from debt collectors to judgment creditors and beyond — and can easily be incorporated into an individual's overall estate plan.

Ben King, Ross & Shoalmire, L.L.P., Texarkana, TX

11:30 a.m. .75 hr | .75 hr G

The Duty of Investment for Guardians of the Estate

Exploring applicable common law duties, statutory duties, and practical applications of how guardian invests and diversifies a ward's estate.

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

12:15 p.m. 30-Minute Break for Lunch and Visit Exhibitors

Lunch included in registration.

THURSDAY AFTERNOON

Presiding Officer:

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

THANK YOU TO OUR
LUNCHEON SPONSOR



LUNCHEON PRESENTATION

12:45 p.m. .50 hr

Watch Your Step: Special Needs Trust Drafting and Administration Errors and Omissions

Review the most common drafting errors and omissions that hinder the Trustee of a Special Needs Trust from providing the trust beneficiary with their best life experience.

Joy M. Eckelkamp, Rapp and Krock, PC, Houston, TX

1:15 p.m. 15-Minute Break

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

Alternatives to Guardianship including Supports and Services

Details about the vast possibilities of available, less restrictive, alternatives to guardianship including supports and services that may alleviate or limit the need for guardianship.

Hon. Jason Cox, Harris County Probate Court #3,
Houston, TX
Taft Robinson, Disability Rights Texas, Houston, TX

THANK YOU TO OUR
BREAK SPONSOR



2:30 p.m. 1.00 hr

Estate Tax: Best Strategies for Estates and Gifts Leading Up to 2026

The estate tax and gift tax exemptions are scheduled to roll back to about 1/2 of their current amounts at the end of 2025. A discussion on the latest strategies and best suggestions for utilizing the current larger exemptions before the roll back, with discussions to focus on planning opportunities for clients of varying net worth and practical issues facing decedent's estates.

Wesley L. Bowers, FizerBeck, Houston, TX
Bernard E. ("Barney") Jones, Attorney at Law, Houston, TX
Norma Montalvo Petrowicz, Attorney at Law, Richmond, TX

3:30 p.m. 10-Minute Break

3:40 p.m. .50 hr

Top Things to Consider When Terminating a Trust

Terminating trusts can, and should, be done for a number of reasons in a variety of different circumstances. This presentation is going to help you identify those situations, guide you through important considerations when doing so, and provide you with some of the tools you may need.

Zachary Wiewel, Texas Trust Law, PLLC, Austin, TX

Materials By:

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

4:10 p.m. .75 hr ethics

When Your Client May Have Diminished Capacity

In estate planning and elder law, attorneys often have clients that may be in some stage of diminished capacity. This creates ethical and legal issues for the attorney that can't be ignored. Explore those issues and ways the attorney can navigate these turbulent waters.

Michele Kosoy Goldberg, Attorney at Law, Bellaire, TX
John R. McNair, J. McNair Dallas Law P.C., Dallas, TX

4:55 p.m. Adjourn to Reception

**M
C
L
E**

This course has been approved for Minimum Continuing Legal Education credit by the State Bar of Texas Committee on MCLE in the amount of 14.25 hours, of which 4.75 credit hours will apply to legal ethics/professional responsibility credit. The University of Texas School of Law is a State Bar of California approved MCLE provider (#1944), and an Oklahoma Bar Association MCLE presumptively-approved provider (#169).

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 and Thursday's evening reception.

FRIDAY MORNING, AUG. 5, 2022

Presiding Officer:

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

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

Hon. Polly Jackson Spencer, Senior Statutory Probate Judge, Retired, San Antonio, TX

Materials By:

Maite Elorduy, Osborne, Helman, Knebel & Scott, LLP, Austin, TX
Jason S. Scott, Osborne, Helman, Knebel & Scott, LLP, Austin, TX

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

Role of the Ad Litem

A review 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. Guy Herman, Travis County Probate Court #1, Austin, TX

10:00 a.m. 15-Minute Break to Visit Exhibitors

10:15 a.m. .75 hr

Real Estate Issues in Elder Law

Review issues to better protect your clients, including homestead and agricultural exemptions; recent changes; to inspect or not, what could possibly go wrong; easements; and transactions with an affidavit of heirship within four years of date of death.

Rayito O. Stephens, Rayito O. Stephens Law Offices, PLLC, Pearland, TX

11:00 a.m. .75 hr | .25 hr ethics

What the Surviving Spouse Needs to Do, and What to Do if They Don't

A practical discussion of the steps a surviving spouse can or should take when their spouse dies and what to do later if those steps are not taken.

Glenn M. Karisch, The Karisch Law Firm, PLLC, Austin, TX

Materials By:

Brandy Baxter-Thompson, Calloway, Norris, Burdette & Weber, PLLC, Dallas, TX
Mickey R. Davis, Davis & Willms, PLLC, Houston, TX

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

Included in registration.

FRIDAY AFTERNOON

Presiding Officer:

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

THANK YOU TO OUR LUNCHEON SPONSOR



LUNCHEON PRESENTATION

12:15 p.m. .50 hr

Small Crimes and Misdemeanors Related to Aging, Dementia, and/or Mental Health Issues

A roadmap for attorneys who counsel clients and their families seeking practical resolution of these matters.

Marilyn G. Miller, Marilyn G. Miller, Attorney at Law, Dripping Springs, TX
G. Gaye Thompson, Thompson & Tiemann LLP, Austin, TX

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

1:15 p.m. .50 hr ethics

Ethics Jeopardy

Test your knowledge of ethics rules in estate planning and probate by engaging in this interactive series of questions and multiple choice answers as to what you would do in certain situations in your practice. This will precede a panel discussion of experts who will discuss the rules applicable to the scenarios presented during the electronic testing.

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

1:45 p.m. .75 hr ethics

To Blab or Not to Blab – Part 1

A review of the rules that require attorneys to preserve client confidentiality and the often-overlooked rules that sometimes authorize and even require attorneys to disclose otherwise, confidential information, including the Rules of Ethics, HIPAA and [other rules]. The panel members will focus on real world dilemmas facing estate planning and probate attorneys every day from their three perspectives of the private practitioner, the judge, and the State Bar Ethics Attorney.

Rita Alister, State Bar of Texas, Austin, TX
Bernard E. ("Barney") Jones, Attorney at Law, Houston, TX
Ruth Ann Stiles, Harris County Probate Court One, Houston, TX

2:30 p.m. 10-Minute Break

2:40 p.m.

.75 hr ethics

To Blab or Not to Blab – Part 2

A review of the rules that require attorneys to preserve client confidentiality and the often-overlooked rules that sometimes authorize and even require attorneys to disclose otherwise, confidential information, including the Rules of Ethics, HIPAA and [other rules]. The panel members will focus on real world dilemmas facing estate planning and probate attorneys every day from their three perspectives of the private practitioner, the judge, and the State Bar Ethics Attorney.

Rita Alister, State Bar of Texas, Austin, TX
Bernard E. ("Barney") Jones, Attorney at Law, Houston, TX
Ruth Ann Stiles, Harris County Probate Court One, Houston, TX

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

Ask the Experts

Hear a panel of seasoned experts respond to your frequently—and sometimes infrequently—asked questions, including practice, professional and ethical issues in estate planning, probate, guardianship and elder law. Please submit your questions in advance to ConferenceQA@utcle.org.

Moderator:

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

Panelists:

Glenn M. Karisch, The Karisch Law Firm, PLLC, Austin, TX
Marilyn G. Miller, Marilyn G. Miller, Attorney at Law, Dripping Springs, TX
Dianne Reis, Attorney at Law, Plano, TX

4:25 p.m.

Adjourn

THANK YOU TO OUR
WEBCAST SPONSOR



SUBSCRIBE TODAY!

UT Law CLE offers annual subscriptions for MCLE On-Demand and our eLibrary *Unlimited Access. Anytime. Anywhere.*

Compare options and subscribe at www.utcle.org/subscriptions

***Subscriptions do not include registrations to live conferences or live webcasts.*

TEXAS NAELA SUMMER CONFERENCE FACULTY & PLANNING COMMITTEE

JOY M. ECKELKAMP*—CO-CHAIR
Rapp and Krock, PC
Houston, TX

BRYN A. POLAND*—CO-CHAIR
Mayo & Poland PLLC
Baytown, TX

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

JULIE ANN EZELL-PEREZ*
Ezell & Ezell, PLLC
Harlingen, TX

BENECIA FLORES*
Petrosewicz Law Firm, P.C.
Richmond, TX

CATHY KIM FOWLKES*
Fowlkes Law Firm, PC
Abilene, TX

MICHELE KOSOY GOLDBERG
Attorney at Law
Bellaire, TX

CHRISTOPHER TOWNS HODGE
Langley & Banack
San Antonio, TX

JESSICA KLUDT*
Townsend Allala, Coulter & Kludt, PLLC
El Paso, TX

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

KEITH D. MAPLES
Noelke Maples St. Leger Bryant, LLP
Austin, TX

JOHN R. MCNAIR*
J. McNair Dallas Law P.C.
Dallas, TX

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

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

MEREDITH ANN SULLIVAN
Farrell & Johnson PLLC
Austin, TX

CATHERINE VERGARA
CareFor
Austin, TX

*Planning Committee member



UT Law CLE is committed to helping attorneys meet their annual Texas MCLE requirements. Following the event, customers will receive a free, on-demand eSupplement that will bring their total available hours to 15.00, including 3.00 hours of ethics.

Are you a 1st or 2nd year attorney? Attend most UT Law CLE conferences for just \$150!
Call 512.475.6700 to register.

ACTION THROUGH EDUCATION

Our efforts for real change against racism.
Learn how we as lawyers can join the fight against racial injustice.
Visit www.utcle.org for more.

UT Law CLE is committed to Practice Excellence.

We are here to support our community while we navigate the coronavirus pandemic together. Information and updates regarding our in-person conferences and live webcasts will be posted at www.utcle.org.

In addition, we continue to offer multiple educational opportunities online—both live and on-demand—by bringing practitioners together virtually. We are fortunate to serve so many of you who strive for excellence in the practice of law.



CONFERENCE FACULTY AND PLANNING COMMITTEE

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

RITA ALISTER
State Bar of Texas
Austin, TX

BRANDY BAXTER-THOMPSON
Calloway, Norris, Burdette & Weber, PLLC
Dallas, TX

KELLEY M. BENTLEY*
The Bentley Law Firm
Sugar Land, TX

WESLEY L. BOWERS
FizerBeck
Houston, TX

HON. JASON COX
Harris County Probate Court #3
Houston, TX

MICKEY R. DAVIS
Davis & Willms, PLLC
Houston, TX

RANDY DREWETT*
Randy E. Drewett, P.C.
Beaumont, TX

CLAIRE D. EAST*
Thompson East, PLLC
Austin, TX

JOY M. ECKELKAMP*
Rapp and Krock, PC
Houston, TX

MAITE ELORDUY
Osborne, Helman, Knebel & Scott, LLP
Austin, TX

JULIE ANN EZELL-PEREZ
Ezell & Ezell, PLLC
Harlingen, TX

BENECIA FLORES*
Petrosewicz Law Firm, P.C.
Richmond, TX

MICHELE KOSOY GOLDBERG
Attorney at Law
Bellaire, TX

TINA R. GREEN*
The Arnold Companies
Texarkana, TX

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

HON. GUY HERMAN*
Travis County Probate Court #1
Austin, TX

MARY ALICE JACKSON*
Boyer & Boyer P.A.
Sarasota, FL

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

CHRISTOPHER D. JONES
Sprouse Shrader Smith PLLC
Amarillo, TX

GLENN M. KARISCH*
The Karisch Law Firm, PLLC
Austin, TX

BEN KING
Ross & Shoalmire, L.L.P.
Texarkana, TX

CHRISTINA LESHER*
The Law Office of Christina Leshner, PC
Houston, TX

LORI A. LEU*
Leu & Peirce, PLLC
Plano, TX

RENÉE C. LOVELACE*
The Lovelace Law Firm, P.C.
Tyler, TX

PI-YI MAYO*
Mayo & Poland PLLC
Baytown, TX

JOHN R. MCNAIR*
J. McNair Dallas Law P.C.
Dallas, TX

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

NORMA MONTALVO PETROSEWICZ
Attorney at Law
Richmond, TX

BRYN A. POLAND*
Mayo & Poland PLLC
Baytown, TX

PAUL PREMACK*
The Premack Law Office
San Antonio, TX

DIANNE REIS
Attorney at Law
Plano, TX

TAFT ROBINSON
Disability Rights Texas
Houston, TX

APRIL ROGERS*
The University of Texas School of Law
Austin, TX

JASON S. SCOTT
Osborne, Helman, Knebel & Scott, LLP
Austin, TX

NANCY SOSA*
Cadence Bank
Austin, TX

HON. POLLY JACKSON SPENCER
Senior Statutory Probate Judge, Retired
San Antonio, TX

RAYITO O. STEPHENS
Rayito O. Stephens Law Offices, PLLC
Pearland, TX

RUTH ANN STILES
Harris County Probate Court One
Houston, TX

MEREDITH ANN SULLIVAN*
Farrell & Johnson PLLC
Austin, TX

G. GAYE THOMPSON
Thompson & Tiemann LLP
Austin, TX

ZACHARY WIEWEL
Texas Trust Law, PLLC
Austin, TX

WESLEY E. WRIGHT*
Wright Abshire, Attorneys
Bellaire, TX

*Planning Committee member

REGISTRATION FORM

ERT22/ER22

Register:
www.utcle.org/conferences/ERT22
www.utcle.org/conferences/ER22

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 have a paid registration to UT Law's Estate Planning and Elder Law Conference may attend the TX NAELA Summer Conference at no charge!
(use far right column to register for both events)

WEDNESDAY ONLY

TX NAELA SUMMER CONFERENCE ONLY
(Open to TX NAELA Members ONLY)

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

Individual registration \$225

Wednesday Lunch RSVP

Wednesday Evening Dinner RSVP

Wednesday Evening Guest Dinner Ticket... \$75 x _____

Printed and Shipped Binder with Registration (Shipping Included) – Available for order through August 5, 2022
Please note that the printed binder will arrive 6–8 weeks after the event. Delivery to P.O. boxes is not permitted.

Printed and Shipped Binder with Registration (Shipping Included) \$48.71 (\$45)

Registration Subtotal \$ _____

THURSDAY AND FRIDAY ONLY

UT LAW ESTATE PLANNING, GUARDIANSHIP AND ELDER LAW CONFERENCE

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

Live, In-Person Registration \$595 | \$645 after July 27

Live Webcast Registration . . \$595 | \$645 after July 27

Thurs–Fri Guest Meal Passes (limit 5) \$50 x _____

Printed and Shipped Binder with Registration (Shipping Included) – Available for order through August 5, 2022
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) \$70.36 (\$65)

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

Webcast Add-on \$75

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

Live, In-Person Registration \$595 | \$645 after July 27

Live Webcast Registration . . \$595 | \$645 after July 27

Wednesday Luncheon RSVP

Wednesday Dinner RSVP

Wednesday Evening Guest Dinner Ticket... \$75 x _____

Thurs–Fri Guest Meal Passes (limit 5) \$50 x _____

Printed and Shipped Binder with Registration (Shipping Included) – Available for order through August 5, 2022
Please note that the printed binder will arrive 2–3 weeks after the scheduled webcast. Delivery to P.O. boxes is not permitted.

Wednesday Conference \$48.71 (\$45)

Thursday and Friday Conference \$70.36 (\$65)

*Tax-exempt rate for, e.g., government employees and nonprofits. Include a Tax-Exempt Certificate with order.

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

Webcast Add-on \$75

Registration Subtotal \$ _____


Texas NAELA
National Academy of Elder Law Attorneys
Texas Chapter

Want to join NAELA?
Visit www.TexasNAELA.com

GUEST MEAL PACKAGE—\$50

You can now purchase a guest meal package for family and guests that includes Thursday and Friday's continental breakfasts and lunches and Thursday's evening reception.

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 6–8 weeks after live event. Hours may vary depending on actual event runtime.

Individual eConference \$645

Post-Course Binder – For Research and Self-Study
Comprehensive binder with papers and slides, available for delivery 6–8 weeks after live event.

Electronic Post-Course Download (PDF) \$226.33 (\$245*)
* Tax-exempt rate for, e.g., government employees and nonprofits. Include a Tax-Exempt Certificate with order.

Printed Post-Course Binder \$272.52 (\$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 \$ _____

ORDER GRAND TOTAL \$ _____

METHOD OF PAYMENT

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

Card/P.O. # _____ CW # _____ Exp. Date (mm/yy) _____ / _____

Authorized Signature _____

* Tax-exempt rate for, e.g., government employees and nonprofits. Include a Texas Sales and Use Tax Exemption Certificate with order.

Visit

www.utcle.org

Email

service@utcle.org

Call

512.475.6700

Facebook

UT Law CLE

LinkedIn

UT-Law-CLE

Twitter

@UTLawCLE

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

August 3, 4–5, 2022 ■ Moody Gardens ■ Galveston, Texas

NON-PROFIT-ORG

U.S. Postage

PAID

U T School of Law

SCAN TO VIEW OUR
COVID-19 PROTOCOLS

See what we're doing differently this year to address the safety concerns of our staff and attendees at in-person events.



ERT22/ER22

GALVESTON

August 3, 4–5, 2022

CONFERENCE LOCATION



Moody Gardens Hotel
Seven Hope Boulevard
Galveston, Texas
888.388.8484

Special Room Rate: \$212
through July 12
(subject to availability)

Parking:

Complimentary self-parking

KEY DATES

July 27, 2022

Last day for early registration rates

July 29, 2022

Last day for full refund cancellation

August 1, 2022

Last day for partial refund cancellation

\$50 processing fee applied

August 3, 2022

TX NAELA Summer Conference Begins

**Open to Members ONLY*

August 4, 2022 8:20 a.m., CT

Conference Begins

August 5, 2022

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

THANK YOU TO OUR SPONSORS

EVENT SPONSORS

Cadence Bank Trust & Asset Management

Frost Wealth Advisors

Austin Trust Company

American National Bank of Texas - Trust Dept.

American National Bank & Trust

Bank of Texas

CONFERENCE SPONSORS

CareFor

Evan S. Howell, Professional Engineer, Real Estate and Property Management

Keever Law PLLC/American Title Company of Houston

Legacy Enhancement Trust

EXHIBITORS

Elder Law Trio Press

Innovative Reverse Mortgages

Krause Financial Services

Merill Lynch- The Special Needs Team

National Care Advisors

Richey Insurance Agency

Texas ABLE Program – A Savings Program for Texans with Disabilities