


**2023 Texas NAELA Summer Conference**  
**August 9, 2023 • Moody Gardens • Galveston, TX**  
**August 9, 2023 • Live Webcast**

**Wednesday Morning, Aug. 9, 2023**

**Presiding Officer:**

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

10:30 am In Galveston Only	<b>Registration and Exhibit Hall Opens</b>
11:00 am In Galveston Only	<b>Board Meeting</b>
11:45 am In Galveston Only	<b>Pick Up Lunch</b>  Included in registration.
In Galveston Only	<b>Thank You to Our Luncheon Sponsor</b>   <b>American National Bank &amp; Trust</b>

**Wednesday Afternoon, Aug. 9, 2023**


---

**General Sessions**

**Presiding Officer:**

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


12:00 pm	<b>Welcoming Remarks</b>
12:15 pm 0.75 hr	<b>Top Five Things Your Elder Law Client Should Know About Their Finances</b>  A comprehensive step by step approach to finances and the decisions necessary to support and protect our aging community.  Dion Hobbs, Merrill Lynch - Special Needs Team - Houston, TX Rayito O. Stephens, Rayito O. Stephens Law Offices, PLLC - Pearland, TX

1:00 pm 0.75 hr	<p><b>MERP: Is It Really a Lien Against Real Property?</b></p> <p>An explanation of why the non-lien from MERP is of concern to title underwriters and how to work with them.</p> <p>Pam Keever, Keever &amp; Wiesenthal PLLC and American Title Company of Houston - Houston, TX</p>
1:45 pm	<p><b>15-Minute Break to Visit Exhibitors</b></p>
2:00 pm 1.00 hr	<p><b>Long-Term Care Veterans' Benefits</b></p> <p>An overview of Non-Service Connected Disability Pension Benefits commonly known as Aid &amp; Attendance. Review and analysis of income and net worth pension eligibility requirements for honorably discharged Veterans' (and their surviving spouses) who served during wartime periods.</p> <p>Erin W. Peirce, Leu &amp; Peirce, PLLC - Plano, TX</p>
3:00 pm 0.50 hr ethics	<p><b>Who is My Elder Law Client?</b></p> <p>A discussion of how to identify your client when other family members are involved in the planning process, addressing conflicts of interest, and attorney-client privilege.</p> <p>Angela Odensky, The Law Office of Angela Odensky, PLLC - Bellaire, TX</p>
3:30 pm	<p><b>15-Minute Break to Visit Exhibitors</b></p>
3:45 pm 0.75 hr 0.25 hr ethics	<p><b>Couples Medicaid Planning</b></p> <p>Explaining the various rules surrounding several types of couple's Medicaid cases, with a focus on the ability to protect assets, to plan in blended families, and to shift gears mid-process as circumstances change.</p> <p>Jennifer L. Coulter, Townsend Allala, Coulter &amp; Kludt, PLLC - El Paso, TX</p>
4:30 pm 0.75 hr	<p><b>Private Professional Guardians and Certified Guardians</b></p> <p>Private Professional Guardians are playing an increasing role in guardianships throughout the state. Discuss what a PPG is, when it is appropriate to seek out a PPG, what PPGs can and cannot do, and how to represent PPGs in court.</p> <p>S. Clinton Nix, Bradbury &amp; Nix - Abilene, TX Nathan Peters, Law Offices of Nathan Peters, PLLC - Denton, TX</p>
5:15 pm In Galveston Only	<p><b>Break for Happy Hour and Dinner</b></p> <p>Join your colleagues for dinner and drinks.</p> <p><b>Thank You To Our Dinner Sponsor</b></p> <div>  </div>

---

**In-Person Only: Medicaid Planning Workshop (limit of 24 registrants)**

	<b>NOTICE</b>  Attendees must RSVP for the Medicaid Planning Workshop when registering for the conference. Attendance is limited to the first 24 people. Please note - the Medicaid Workshop is only available in person.
12:00 pm In Galveston Only	<b>Welcoming Remarks</b>
12:15 pm In Galveston Only 1.75 hrs 0.75 hr ethics	<b>Medicaid Planning Nuts and Bolts - A Case Study</b>  A comprehensive 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.  Kelley M. Bentley, The Bentley Law Firm - Sugar Land, TX Benecia Flores, Petrosewicz Law Firm, P.C. - Richmond, TX Cathy Kim Fowlkes, Fowlkes Law Firm, PC - Abilene, TX Lynnelle Loke Moore, Loke Moore Law, PLLC - San Antonio, TX
2:00 pm In Galveston Only	<b>15-Minute Break to Visit Exhibitors</b>
2:15 pm In Galveston Only 1.50 hrs	<b>Medicaid Planning Nuts and Bolts - A Case Study</b>  Continuation of the comprehensive 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.  Kelley M. Bentley, The Bentley Law Firm - Sugar Land, TX Benecia Flores, Petrosewicz Law Firm, P.C. - Richmond, TX Cathy Kim Fowlkes, Fowlkes Law Firm, PC - Abilene, TX Lynnelle Loke Moore, Loke Moore Law, PLLC - San Antonio, TX
3:45 pm In Galveston Only	<b>15-Minute Break to Visit Exhibitors</b>
4:00 pm In Galveston Only 1.25 hrs	<b>Medicaid Planning Nuts and Bolts - A Case Study</b>  Continuation of the comprehensive 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.  Kelley M. Bentley, The Bentley Law Firm - Sugar Land, TX Benecia Flores, Petrosewicz Law Firm, P.C. - Richmond, TX Cathy Kim Fowlkes, Fowlkes Law Firm, PC - Abilene, TX Lynnelle Loke Moore, Loke Moore Law, PLLC - San Antonio, TX

5:15 pm In Galveston Only	<b>Break for Happy Hour and Dinner</b>  Join your colleagues for dinner and drinks.  <b>Thank You to Our Dinner Sponsor</b>  
5:15 pm In Galveston Only	<b>Medicaid Planning Workshop Adjourns</b>
5:20 pm	<b>Please Join Us in Zoom for the TXNAELA Membership Meeting (6:15 p.m. CT) and Final Session (7:00 p.m. CT):</b> <a href="https://us02web.zoom.us/j/89276516727">https://us02web.zoom.us/j/89276516727</a>

## Wednesday Evening, Aug. 9, 2023

### Presiding Officer:

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

In Galveston Only	<b>Wednesday Evening Dinner (Included in Registration)</b>
In Galveston Only	<b>Wednesday Dinner Additional Non-Registrant Guest \$75</b>
6:15 pm In Galveston Only	<b>Dinner &amp; Membership Meeting</b>
6:55 pm	<b>Please Join Us in Zoom for the Final Session (7:00 p.m. CT):</b> <a href="https://us02web.zoom.us/j/89276516727">https://us02web.zoom.us/j/89276516727</a>
7:00 pm 1.00 hr	<b>Moderated Table Discussion: What's Your Version of the Texas Estates Code?</b>  Probate Code to Estates Code to e-filing to pandemic and beyond: Do you sometimes feel like the procedure is so different county to county that we cannot possibly be using the same law? Join your colleagues as we compare notes and see just how different or just how similar we really are across the State.  Wesley E. Wright, Wright Abshire, Attorneys P.C. - Bellaire, TX
8:00 pm	<b>Adjourn</b>