


**2024 Texas NAELA Summer Conference**  
**August 7, 2024 • La Cantera Resort & Spa • San Antonio, TX**



**Wednesday Morning, Aug. 7, 2024**

	<p><b>Interested in a Professional Headshot?</b></p> <p>Refresh your online presence with a FREE PROFESSIONAL HEADSHOT for the first 75 Texas NAELA members attending the Summer Conference who sign up. Email <a href="mailto:Lynnelle@lokemoorelaw.com">Lynnelle@lokemoorelaw.com</a> with your preference of a morning or afternoon time. Special thanks to our sponsors McKnight Title and Tim Allums, Realtor KW Heritage.</p>
10:30 am	<p><b>Registration and Exhibit Hall Opens</b></p>
11:00 am	<p><b>Board Meeting</b></p> <p>All TX NAELA members are welcome to join.</p>
11:45 am	<p><b>Pick Up Lunch</b></p> <p>Included in registration.</p>
	<p><b>Thank You to Our Luncheon Sponsor</b></p> <div style="text-align: center;">  </div>

**Wednesday Afternoon, Aug. 7, 2024**

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<p><b>General Session</b>  <b>Presiding Officer:</b>  <b>Joy Eckelkamp</b>, Rapp and Krock, PC - Houston, TX</p>	
12:00 pm	<p><b>Welcoming Remarks</b></p>
12:15 pm 0.75 hr 0.25 hr ethics	<p><b>My Step-Kids Own My Home: And Other Ways We Need to Plan Better in Blended Families</b></p> <p>Explore how to address blended families in estate planning, Medicaid, VA, and probate contexts, including best practices and how to speak with your clients about the challenges non-traditional families bring.</p> <p>Jennifer L. Coulter, Townsend Allala, Coulter &amp; Kludt, PLLC - El Paso, TX  Erin W. Peirce, Leu, Peirce, &amp; Olson, PLLC - Plano, TX</p>

<p>1:00 pm 0.25 hr ethics</p>	<p><b>Lurking in the Shadows: The Growing Threat of the Unauthorized Practice of Law in Estate Planning and Long-Term Care Medicaid Planning</b></p> <p>Update on the evolving landscape of the unauthorized practice of law (UPL) in estate planning and long-term care Medicaid planning. Discuss the manner in which individuals and entities engage in these unauthorized activities, how it endangers those who are targeted by and use the services of these unauthorized individuals/entities, and why lawyers should be concerned.</p> <p>Ben King, Ross &amp; Shoalmire PLLC - Texarkana, TX</p>
<p>1:15 pm 0.75 hr</p>	<p><b>Using Artificial Intelligence in Your Elder Law Practice: Can ChatGPT Get My Clients on Medicaid?</b></p> <p>Explore what artificial intelligence is, and what it should and should not be used for in your practice. Discuss several current applications of artificial intelligence that are designed for law firms.</p> <p>Michael Delaney, DDV Law, Ltd. - Orland Park, IL</p>
<p>2:00 pm</p>	<p><b>15-Minute Break to Visit Exhibitors</b></p> <p><b>Thank You to Our Break Sponsor</b></p> 
<p>2:15 pm 1.50 hrs 0.25 hr ethics</p>	<p><b>What You Don't Know Can Hurt You: Oil Gas, Wind, and Water</b></p> <p>A participatory, interactive presentation covering what you have to anticipate in the area of oil and gas law as you represent families and individuals.</p> <p>Moderator: Wesley E. Wright, Wright Abshire, Attorneys P.C. - Bellaire, TX</p> <p>Panelists: Lisa Shoalmire, Ross &amp; Shoalmire PLLC - Texarkana, TX O. Henry (Mike) Young, Law Offices of O. Henry (Mike) Young, PC - Abilene, TX</p>
<p>3:45 pm</p>	<p><b>15-Minute Break to Visit Exhibitors</b></p> <p><b>Thank You to Our Break Sponsor</b></p> 
<p>4:00 pm 0.50 hr</p>	<p><b>Medicaid Strategies for Handling Homesteads Exceeding the Maximum Equity Value</b></p> <p>With property values trending upward, the annual adjustment for property values may not be enough allow property to stay below the maximum equity value for Medicaid eligibility. Get - or share - some ideas on how to handle this issue.</p> <p>Marilyn G. Miller, Marilyn G. Miller, Attorney at Law - Dripping Springs, TX</p>

4:30 pm  
0.75 hr

**When Grandpa Gets a Girlfriend: What To Do When You Suspect a Romance Scam**

Sweetheart swindlers use manipulation and fraud to deceive elders into giving them money, often leaving elders financially ruined and emotionally devastated. Learn the warning signs of a romance scam, how to approach the victim with your concerns, what law enforcement requires to bring criminal charges, and what you can do to protect the elder's assets.

Alicia V. Patterson, Dallas County District Attorney's Office - Elder Abuse Unit - Dallas, TX

5:15 pm

**Break (Pick Up Drinks)**

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**Medicaid Planning Workshop (limit of 24 registrants)**

**Presiding Officer:**

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

**NOTICE**

Attendees must RSVP and pay an additional fee of \$75 for the Medicaid Planning Workshop when registering for the conference. Attendance is limited to the first 24 people.

12:00 pm

**Welcoming Remarks**

12:15 pm  
1.75 hrs  
0.25 hr ethics

**Medicaid Planning Nuts and Bolts - A Case Study**

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. A hands-on, interactive case study from the initial client call to the gathering and interpretation of information, the Medicaid application, correspondence with HHS, and the possible appeal.


Kelley M. Bentley, The Bentley Law Firm - Sugar Land, 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  
Lori A. Leu, Leu, Peirce, & Olson, PLLC - Plano, TX  
Lynnelle Loke Moore, Loke Moore Law, PLLC - San Antonio, TX  
Lauren Olson, Leu, Peirce, & Olson, PLLC - Plano, TX

2:00 pm

**15-Minute Break to Visit Exhibitors**

**Thank You to Our Break Sponsor**



<p>2:15 pm 1.50 hrs 0.25 hr ethics</p>	<p><b>Medicaid Planning Nuts and Bolts - A Case Study Resumes</b></p> <p>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. A hands-on, interactive case study from the initial client call to the gathering and interpretation of information, the Medicaid application, correspondence with HHS, and the possible appeal.</p> <p>Kelley M. Bentley, The Bentley Law Firm - Sugar Land, TX Julie Ann Ezell-Perez, Ezell &amp; Ezell, PLLC - Harlingen, TX Benecia Flores, Petrosewicz Law Firm, P.C. - Richmond, TX Cathy Kim Fowlkes, Fowlkes Law Firm, PC - Abilene, TX Lori A. Leu, Leu, Peirce, &amp; Olson, PLLC - Plano, TX Lynnelle Loke Moore, Loke Moore Law, PLLC - San Antonio, TX Lauren Olson, Leu, Peirce, &amp; Olson, PLLC - Plano, TX</p>
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<p>5:15 pm</p>	<p><b>Break (Rejoin Group and Pick Up Drinks)</b></p>

**Wednesday Evening, Aug. 7, 2024**

**Presiding Officer:**  
**Joy Eckelkamp**, Rapp and Krock, PC - Houston, TX

5:30 pm  
1.00 hr  
0.25 hr ethics

**Happy Hour - Elder Law Trivia**

Grab a glass of wine or your favorite beverage, find a seat, and engage with your table-mates in a friendly game of Elder Law Trivia. A prize awaits the winning table.

Moderator:

Angela Odensky, The Law Office of Angela Odensky, PLLC - Bellaire, TX

Panelists:

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

Ruth-Ann Toups, The Toups Law Firm - Spring, TX

**Wednesday Evening Dinner (Included in Registration)**

**Wednesday Dinner Additional Non-Registrant Guest \$90**

6:30 pm

**Dinner and Business Meeting**

Join your colleagues for dinner.

**Thank You to Our Dinner Sponsor**



8:00 pm

**Adjourn**