


**2025 Texas NAELA Summer Conference**  
**July 30, 2025 • La Cantera Resort & Spa • San Antonio, TX**

**Wednesday Morning, July 30, 2025**

	<b>Guest Meal Package—\$60</b>  Have family members or guests joining you in San Antonio? You can now purchase a guest meal package for each of your guests, that includes Wednesday's lunch and reception.
10:15 am	<b>Registration and Exhibit Hall Opens</b>
10:30 am	<b>Board Meeting</b>  All TX NAELA members are welcome to join.
11:30 am	<b>Pick Up Lunch</b>  Included in registration.  <b>Thank You to Our Luncheon Sponsor</b>  

**Wednesday Afternoon, July 30, 2025**

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**General Session**

**Presiding Officer:**

**Lisa Shoalmire**, Ross & Shoalmire PLLC - Texarkana, TX

11:50 am	<b>Welcoming Remarks</b>
12:00 pm 0.50 hr	<b>Transitioning Between Public Benefit Programs</b>  Changes in a client's health, living arrangement, resources, or income can derail the client's well-crafted, and sometimes long and hard-fought, eligibility plan. Learn how to help a client on public benefits when the client needs the services of a different program than the one they are on.  Benecia Flores, Petrosewicz Law Firm, P.C. - Richmond, TX

12:30 pm 0.75 hr	<p><b>Can't I Even Discharge My Student Loans in Death? A Practical Guide to Handling Probate Creditors</b></p> <p>A practical guide to handling debt in probate estates from the initial inquiry into whether there is debt to the final payment or barring of any creditors. Discuss set-asides and family allowances as well as MERP, how to treat secured and unsecured creditors, and how creditor processes vary in dependent and independent administrations.</p> <p>Jennifer L. Coulter, Townsend Allala, Coulter &amp; Kludt, PLLC - El Paso, TX Jessica L.D. Guobadia, Crain Caton &amp; James - Houston, TX</p>
1:15 pm	<p><b>15-Minute Break to Visit Exhibitors</b></p>
1:30 pm 0.75 hr	<p><b>Stretch It Out: Drafting and Funding Trusts that Qualify Under SECURE Act 1.0 and 2.0</b></p> <p>The SECURE Act 1.0 and SECURE Act 2.0 changed the rules regarding naming trusts as beneficiaries of qualified accounts. Learn how to avoid pitfalls so that your trusts protect your clients' loved ones as intended.</p> <p>Christopher T. Freyder, Rainey &amp; Rainey, PLLC - Georgetown, TX</p>
2:15 pm 0.50 hr	<p><b>Don't Screw Up the Guardianship Case for the Future Litigator</b></p> <p>Realistic strategies for handling contested guardianships, including tips for voir dire, jury trial and appeal.</p> <p>Jessica Newill, Gardner Law Firm - San Antonio, TX</p>
2:45 pm 0.75 hr	<p><b>Trust Me, It's Taxable: Trust Income and Estate Tax for Elder Law Attorneys</b></p> <p>This session breaks down the complex world of trust taxation with a practical focus on grantor status, special needs trusts, Medicaid planning, and estate tax inclusion.</p> <p>John K. Ross IV, Ross &amp; Shoalmire PLLC - Texarkana, TX</p>
3:30 pm	<p><b>15-Minute Break to Visit Exhibitors</b></p>
3:45 pm 0.75 hr	<p><b>Planning with Marital Property in Mind</b></p> <p>Marital property can be a friend or foe. An understanding of marital property rules and planning strategies related to them are an essential tool in any elder law attorney's toolbox.</p> <p>Ruth-Ann Toups, The Toups Law Firm - Spring, TX</p>
4:30 pm 0.50 hr	<p><b>Scammed Clients: How to Advise from a Law Enforcement Perspective</b></p> <p>Learn about some of the most common frauds and scams, where to report suspected fraud and scams and share tips to protect yourself from scammers.</p> <p>Sharleigh D. Drake, Texas Department of Public Safety, Criminal Investigations Division - San Antonio, TX</p>

5:00 pm 0.50 hr ethics	<b>Real World AI Use in Elder Law Practice</b>  Hear real examples from the field on how elder law attorneys use AI today—and what they have learned along the way.  Ben King, Ross & Shoalmire PLLC - Texarkana, TX P. James Rainey, Rainey & Rainey, PLLC - Waco, TX
5:30 pm	<b>Break to Business Meeting and Reception</b>

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### Medicaid Planning Workshop (\$95 materials fee, limit of 24 registrants)

	<b>NOTICE</b>  Attendees must RSVP and pay an additional fee of \$95 for the Medicaid Planning Workshop when registering for the conference. Attendance is limited to the first 24 people.
11:50 am	<b>Welcoming Remarks</b>
12:00 pm 1.25 hrs	<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. 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.  Lori A. Leu, Leu, Peirce, & Olson, PLLC - Plano, TX Lauren Olson, Leu, Peirce, & Olson, PLLC - Plano, TX
1:15 pm	<b>15-Minute Break to Visit Exhibitors</b>
1:30 pm 2.00 hrs 0.50 hr ethics	<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. 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.  Lori A. Leu, Leu, Peirce, & Olson, PLLC - Plano, TX Lauren Olson, Leu, Peirce, & Olson, PLLC - Plano, TX
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5:30 pm	<b>Break to Business Meeting and Reception</b>

## Wednesday Evening, July 30, 2025

5:30 pm

**Wednesday Evening Reception**

**Thank You to Our Reception Sponsor**

