

28TH ANNUAL
**ESTATE PLANNING, GUARDIANSHIP
AND ELDER LAW CONFERENCE**

July 30–31, 2026

Moody Gardens ■ Galveston, Texas

 **Live Webcast July 30–31**

Earn up to 15.00 Hours of Credit Including 3.25 Hours of Ethics and 4.00 of Guardianship (Hours Vary by State);
MCLE Credit Approved in TX, CA, OK, and PA

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

Earn up to 18.00 Hours of Texas Certified Professional Accounting Credit and National Accounting CPE Credit

Additional Credit Expected for ICB Certified Trust and Financial Advisor (CTFA) and TX Guardianship Certification Board (GCB)



TX NAELA MEMBERS – COME A DAY EARLY!

TEXAS NAELA SUMMER CONFERENCE

Open to TX NAELA Members ONLY

July 29, 2026

Moody Gardens ■ Galveston, Texas

Earn Up To 5.25 Hours of Credit Including 1.50 Hour of Ethics Credit MCLE Credit Approved in TX, CA, OK, and PA

Earn up to 6.00 Hours of Texas Certified Professional Accounting Credit

2026

TEXAS NAELA SUMMER CONFERENCE

Open to TX NAELA Members ONLY

July 29, 2026 ■ Moody Gardens ■ Galveston, Texas

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Earn up to 6.00 Hours of Texas Certified Professional Accounting Credit

WEDNESDAY MORNING, JULY 29, 2026

10:15 a.m. Registration and Exhibit Hall Opens

10:30 a.m. Board Meeting
All TX NAELA members are welcome to join.

11:30 a.m. Pick Up Lunch
Included in registration.

THANK YOU TO OUR
LUNCHEON SPONSOR



WEDNESDAY AFTERNOON

Presiding Officer:
Kelley M. Bentley, Bentley Eckelkamp, PLLC, Sugar Land, TX

11:50 a.m. Welcoming Remarks

12:00 p.m. .50 hr
Property Tax Exemptions: A Guide for Elder Law Practitioners

In assisting clients with estate plans, Medicaid eligibility plans, and trust and estate administration, elder law attorneys frequently encounter case scenarios in which the status of property tax exemptions on real property is affected. This primer summarizes the elements and application requirements of the most common property tax exemptions available to elder law clients, as well as provides tips for attorneys to ensure the plans they craft help clients maximize these valuable tax exemptions.

Benecia Flores, Petrowicz Law Firm, P.C.,
Richmond, TX

12:30 p.m. .75 hr | .25 hr ethics

Does That Really Work? Uncommon Medicaid Strategies

Hear Medicaid eligibility strategies that are often unknown, misunderstood, or considered "too risky."

John K. Ross IV, Ross & Shoalmire PLLC,
Texarkana, TX

1:15 p.m. 15-Minute Break to Visit Exhibitors

1:30 p.m. .50 hr | .25 hr ethics

An Unconventional Solution for a Conventional Problem: How Victims of Elder Abuse Can Pursue a Protective Order Even When There is No Family Violence

This presentation focuses on an underutilized private cause of action found in the Texas Code of Criminal Procedure: the 7B Protective Order. This claim can aid elder abuse victims even if there is no violence or pending guardianship.

Mike Day, Day Family Law, PLLC, Houston, TX

2:00 p.m. .50 hr | .25 hr ethics

Firearms: Planning for these Pesky Powerful Things

How to handle firearms in a Texas estate plan when the owner has capacity and when they do not. Gain insight on how to manage firearms using a power of attorney, trust, and will, while also accounting for the NFA and the VA in the planning process.

P. James Rainey, Rainey & Rainey, PLLC, Waco, TX

2:30 p.m. .50 hr

Capital Gains Freedom: Beneficiary Deemed Owner Trusts and Other Strategies

Explore powerful techniques using Beneficiary Deemed Owner Trusts and other advanced planning tools to achieve capital gains freedom and protect your clients' wealth from unnecessary taxation.

Lisa Shoalmire, Ross & Shoalmire PLLC, Texarkana, TX

3:00 p.m. 15-Minute Break to Visit Exhibitors

THANK YOU TO OUR
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3:15 p.m. .50 hr

The Trials and Tribulations of Obtaining Legal IDs for Seniors and Persons with Disabilities

Discuss some of the ongoing issues for seniors and persons with disabilities in obtaining legal identification when they have no prior form of identification, a previously expired or lost form of identification, missing the standard documents to prove their identification, or have lost their State issued Driver's License due to a guardianship.

Joy Eckelkamp, Bentley Eckelkamp, PLLC,
Sugar Land, TX

3:45 p.m. .50 hr ethics

The Incapacitated or Deceased Attorney

A practical guide to dealing with an incapacitated or deceased professional's estate.

Jessica Newill, Gardner Law Firm, San Antonio, TX

4:15 p.m. .75 hr

Deeds, Disputes, and Duct Tape – How to fix Those Pesky Real Estate Problems

Discuss how to fix various real estate problems such as errors in deeds, payment of taxes by one co-owner without other co-owners helping and other similar property issues.

Kristen Quinney Porter, Kristen Quinney Porter, LLC,
New Braunfels, TX

5:00 p.m. .75 hr | .25 hr ethics

Intersection of Elder Law and Gray Divorce

As divorce rates among adults 50 and older continue to rise, attorneys increasingly encounter clients whose legal needs span both family law and elder law — from dividing pensions and IRAs to preserving Medicaid eligibility, updating estate plans mid-dissolution and dealing with capacity issues. This presentation brings those two disciplines into conversation, highlighting the financial, medical, and planning considerations that make the intersection of gray divorce and elder law uniquely complex.

Patricia N. Carter, Carter Morris, LLP, Houston, TX
Erin W. Peirce, Leu, Peirce, & Olson, PLLC, Plano, TX

5:45 p.m. Break to Business Meeting and Reception

WEDNESDAY EVENING

THANK YOU TO OUR
RECEPTION SPONSOR



5:45 p.m. – 6:45 p.m.

Included for registrants;
\$60 for non-registrant guests.

6:15 p.m. TX NAELA Member Meeting

TEXAS NAELA SUMMER CONFERENCE FACULTY & PLANNING COMMITTEE

KELLEY M. BENTLEY*— CHAIR Bentley Eckelkamp, PLLC Sugar Land, TX	JOY ECKELKAMP Bentley Eckelkamp, PLLC Sugar Land, TX	JESSICA NEWILL* Gardner Law Firm San Antonio, TX	P. JAMES RAINEY Rainey & Rainey, PLLC Waco, TX
PATRICIA N. CARTER Carter Morris, LLP Houston, TX	BENECIA FLORES* Petrosewicz Law Firm, P.C. Richmond, TX	ERIN W. PEIRCE Leu, Peirce, & Olson, PLLC Plano, TX	JOHN K. ROSS IV Ross & Shoalmire PLLC Texarkana, TX
MIKE DAY Day Family Law, PLLC Houston, TX	CATHY KIM FOWLKES* Fowlkes Law Firm, PC Abilene, TX	KRISTEN QUINNEY PORTER Kristen Quinney Porter, LLC New Braunfels, TX	LISA SHOALMIRE* Ross & Shoalmire PLLC Texarkana, TX

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.

WEDNESDAY GUEST MEAL PACKAGE—\$60

Have family members or guests joining you in Galveston?

You can now purchase a guest meal package for each of your guests, that includes Wednesday's lunch and 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 5.25 hours, of which 1.50 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).

ESTATE PLANNING, GUARDIANSHIP AND ELDER LAW CONFERENCE FACULTY AND PLANNING COMMITTEE

WESLEY E. WRIGHT*—CHAIR Wright Abshire, Attorneys P.C. Bellaire, TX	LAUREN M. FITTE Ripp Grossman & Fitte LLP Austin, TX	BRI LOUGHLIN JOHNSON Perkins Coie Austin, TX	P. JAMES RAINEY* Rainey & Rainey, PLLC Waco, TX
APRIL STEPHENS ROGERS*— DIRECTOR The University of Texas School of Law Austin, TX	WADE RYAN FITZHENRY Wright Abshire, Attorneys, PC Bellaire, TX	RENÉE C. LOVELACE* The Lovelace Law Firm, P.C. Tyler, TX	JOHN K. ROSS IV* Ross & Shoalmire PLLC Texarkana, TX
ERIC BEAN Ferguson Braswell Fraser Kubasta PC (FBFK LAW) Houston, TX	MICHELE KOSOY GOLDBERG Attorney at Law Bellaire, TX	COLETON W. MAYO Mayo & Poland PLLC Baytown, TX	HON. KENNA SEILER Montgomery County Probate Court Number One Conroe, TX
KELLEY M. BENTLEY* Bentley Eckelkamp, PLLC Sugar Land, TX	SEAN P. HEALY Healy Law Offices, P.C. Tyler, TX	PI-YI MAYO* Mayo & Poland PLLC Baytown, TX	VICTORIA D. SEYBOLD Osborne, Helman, Scott, Knisely & Stanton, LLP Austin, TX
THERESA A. CLARKE* Kean Miller LLP Houston, TX	JOHN B. HENRY III* Law Office of John B. Henry, III, PLLC Bellaire, TX	CLAY DAVIS MCKENNA* J.P. Morgan Private Bank Houston, TX	HON. JERRY SIMONEAUX Harris County Probate Court 1 Houston, TX
HON. CLARINDA COMSTOCK Harris County Probate Court No. Four Houston, TX	PAM KEEVER* Keever & Wiesenthal and American Title Company of Houston Houston, TX	ANNA M. MÉNDEZ Huntington National Bank Austin, TX	DARLENE PAYNE SMITH* Crain, Caton & James, P.C. Houston, TX
JENNIFER L. COULTER* Townsend Allala, Coulter & Kludt, PLLC El Paso, TX	BEN KING Ross & Shoalmire PLLC Texarkana, TX	MARILYN G. MILLER* Marilyn G. Miller, Attorney at Law Dripping Springs, TX	JOELLEN SNOW Attorney at Law Houston, TX
BRYAN DEHAN The Akeeli Group Houston, TX	HON. LILY LEAL Harris County Probate Court No. 5 Houston, TX	SARAH PATEL PACHECO Jackson Walker LLP Houston, TX	NANCY SOSA* Cadence Bank Austin, TX
RANDY DREWETT* Randy E. Drewett, P.C. Beaumont, TX	CHRISTINA LESHEN* The Law Office of Christina Leshen, PC Houston, TX	BRYN A. POLAND* Mayo & Poland PLLC Baytown, TX	JOHN R. STROHMEYER Strohmeier Law PLLC Houston, TX
JOY ECKELKAMP* Bentley Eckelkamp, PLLC Sugar Land, TX	LORI A. LEU* Leu, Peirce, & Olson, PLLC Plano, TX	STEPHEN F. POST Fullenweider Wilhite Houston, TX	HON. FRANSHENEKA (FRAN) WATSON Harris County Probate Court No. 5 Houston, TX
H. CLYDE FARRELL* Farrell & Johnson PLLC Austin, TX	LYNNELLE LOKE MOORE Loke Moore Law, PLLC San Antonio, TX	ELISA DILLARD RAINEY* Rainey & Rainey, PLLC Waco, TX	*Planning Committee member

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Additional Credit Expected for ICB Certified Trust and Financial Advisor (CTFA) and TX Guardianship Certification Board (GCB)

Times listed are Central Standard

THURSDAY MORNING, JULY 30, 2026

Presiding Officer:

**Wesley E. Wright, Wright Abshire,
Attorneys P.C., Bellaire, 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

Case Law Update

A review of recent cases affecting the practice of estate planning, guardianship, and elder law in Texas and around the country.

Elisa Dillard Rainey, Rainey & Rainey, PLLC, Waco, TX

Materials By:

Gerry W. Beyer, Texas Tech University School of Law,
Lubbock, TX

9:00 a.m. .75 hr

Business Interests in Estate Planning and Medicaid

Business ownership adds complexity to estate and long-term care planning, where control, transferability, and valuation all matter. This session provides practical guidance on protecting business interests, ensuring continuity during incapacity, and navigating Medicaid eligibility rules.

Ben King, Ross & Shoalmire PLLC, Texarkana, TX

9:45 a.m. 15-Minute Break

10:00 a.m. .75 hr

Medicaid Update

Identify and explain recent changes in Medicaid law and policy. Discuss Medicaid advocacy strategies that are “hot,” either because they are new or because they are underutilized but work well.

H. Clyde Farrell, Farrell & Johnson PLLC, Austin, TX
Marilyn G. Miller, Marilyn G. Miller, Attorney at Law,
Dripping Springs, TX

10:45 a.m. .50 hr

Medicare Supplemental Policies: What You Need to Know and How They Can Save Your Client Money on Their Medical Costs

Clients who choose fee for service “Traditional Medicare” need to have a Medicare Supplemental or Medigap policy to protect from the costs, deductibles and co-payments of Medicare. This presentation explains open enrollment and the types of policies available to cover all of these medical expenses that fee for service Medicare does not cover.

Pi-Yi Mayo, Mayo & Poland PLLC, Baytown, TX

11:15 a.m. .50 hr | .50 hr G

A Tour Through the CME

This presentation provides a practical walkthrough of the Physician’s Certificate of Medical Examination, examining the specific statutory requirements of the Texas Estates Code and the nuances of documenting incapacity. Learn to identify common pitfalls in these assessments to ensure your evidence withstands judicial scrutiny and accurately supports the legal standard for guardianship.

Coleton W. Mayo, Mayo & Poland PLLC, Baytown, TX

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

Lunch included in registration.

THURSDAY AFTERNOON

Presiding Officer:

**John K. Ross IV, Ross & Shoalmire PLLC,
Texarkana, TX**

LUNCHEON PRESENTATION

12:15 p.m. .75 hr | .25 hr ethics

Planning for Cross Border Families & Assets

This topic highlights potential estate planning and administration issues faced by U.S. families with non-U.S. assets or beneficiaries, as well as non-U.S. families with U.S. assets or beneficiaries. Special consideration is given to probate avoidance options in and outside of the U.S., as well as estate, gift, and income tax nuances.

Lauren M. Fitte, Ripp Grossman & Fitte LLP,
Austin, TX

1:00 p.m. 15-Minute Break

1:15 p.m. .75 hr | .25 hr ethics

Tax Penalties – Practical Takeaways for Estate Planners

This presentation provides essential insights for estate planners and client advisers on tax penalty risks and how to address them proactively. Hear about the increase in IRS tax penalty enforcement in recent years, practical implications for estate planning clients, and best practices for avoiding (or minimizing) penalty assertions and setting client up for success in defenses.

Bri Loughlin Johnson, Perkins Coie, Austin, TX

2:00 p.m. 1.00 hr | .50 hr ethics | 1.00 hr G

Alternatives to Guardianship including Support Services

Finding the Power in your Powers: avoiding or limiting guardianship through the use of planning tools. The practical implementation of traditional tools such as powers of attorney and supportive decision-making agreements and how to work around their limitations.

Hon. Clarinda Comstock, Harris County Probate
Court No. Four, Houston, TX
Hon. Kenna Seiler, Montgomery County Probate
Court Number One, Conroe, TX

3:00 p.m. 10-Minute Break

GUEST MEAL PACKAGE—\$95

Have family members or guests joining you in Galveston?

You can now purchase a guest meal package for each of your guests, that includes Thursday and Friday’s continental breakfasts and lunches, as well as the Thursday evening after-dinner reception.

THANK YOU TO OUR
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3:10 p.m. .75 hr | .25 hr ethics | .75 hr G

Evidentiary, Procedural and Service Issues in Contested and Uncontested Guardianships - "Why Is My Case Not Moving Faster?"

An overview of the required details and common pitfalls to avoid in contested and uncontested guardianship matters at the incipient stages of filing and how to get your matter heard in court expeditiously.

Hon. Lily Leal, Harris County Probate Court No. 5, Houston, TX

3:55 p.m. .75 hr | .25 hr ethics

"SECUREity" Under the AMBT Blanket: The EDB's Lifetime Stretch Under SECURE

Gain insight on drafting SECURE-compliant SNTs and repairing non-compliant trusts.

Lynelle Loke Moore, Loke Moore Law, PLLC, San Antonio, TX

Materials By:

Karen S. Gerstner, Karen S. Gerstner & Associates, P.C., Houston, TX

4:40 p.m. 1.00 hr | .25 hr ethics

Unearthing the Practical Use of AI Tools for Our Practice and Yours

Come away with real, practical tools you can use to begin your AI journey. How are you using AI? If you're not, because you fear it or feel it's too complicated and time consuming, our goal is to help you get going. AI is an elephant to be eaten, bite by bite!

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

Wade Ryan Fitzhenry, Wright Abshire, Attorneys, PC, Bellaire, TX

5:40 p.m. Adjourn

THURSDAY EVENING

THANK YOU TO OUR
RECEPTION SPONSOR



BANKING
INVESTMENTS
INSURANCE

AFTER-DINNER DESSERT BAR & COCKTAILS (RSVP Requested)

7:30 p.m. – 8:30 p.m.

Join us at the Moody Gardens Pool Deck Terrace for a "Fun with Frost" evening with after-dinner desserts and cocktails. Families and guests are welcome!

FRIDAY MORNING, JULY 31, 2026

Presiding Officer:

Elisa Dillard Rainey, Rainey & Rainey, PLLC, Waco, TX

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

Includes continental breakfast.

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8:00 a.m. .50 hr

Marital Property Agreements and What's All the Fuss About?

Analyze Texas marital property agreements—including premarital, postmarital, and agreements converting separate property to community property—with a focus on enforceability issues such as voluntariness, unconscionability, financial disclosure, relevant case law, and practical drafting strategies. Also cover non-marital cohabitation agreements, addressing statute of frauds considerations, public policy limitations, and key drafting provisions for unmarried couples living together.

Stephen F. Post, Fullenweider Wilhite, Houston, TX

8:30 a.m. 1.00 hr | .25 hr ethics | 1.00 hr G

Top Ten Lessons Learned When Handling Contested Guardianships

Discussion of issues that guardianship practitioners should be aware of and prepare to address when involved in guardianship litigation. The discussion includes both pretrial and trial strategies.

Hon. Fransheneka (Fran) Watson, Harris County Probate Court No. 5, Houston, TX

Sarah Patel Pacheco, Jackson Walker LLP, Houston, TX

Darlene Payne Smith, Crain, Caton & James, P.C., Houston, TX

9:30 a.m. 15-Minute Break

9:45 a.m. .75 hr | .25 hr ethics

Advanced Estate Planning Structures

A practical guide for practitioners at any level, offering clear explanations of how to use a wide range of estate-planning structures — including SLATs (Spousal Lifetime Access Trusts), Bypass and Disclaimer Bypass Trusts, QTIP Trusts, Irrevocable Life Insurance Trusts (ILITs), Separate Share Trusts, and other commonly used "acronym" planning techniques.

Eric Bean, Ferguson Braswell Fraser Kubasta PC (FBFK LAW), Houston, TX

10:30 a.m. .75 hr | .75 hr G

Preserving Choice: Legal Standards for Consent and the Need for Guardianship

When does a client have the right to say "yes"—and when does the law step in to say "no"? This course explores the delicate balance between personal autonomy and protection, focusing on a client's ability to consent and the legal threshold for guardianship. Through practical examples and Texas-specific guidance, attendees will learn how to recognize capacity, preserve client rights, and identify when guardianship is truly necessary.

Victoria D. Seybold, Osborne, Helman, Scott, Knisely & Stanton, LLP, Austin, TX

11:15 a.m. 30-Minute Break for Lunch and Visit Exhibitors

Lunch included in registration.

FRIDAY AFTERNOON

Presiding Officer:

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

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LUNCHEON PRESENTATION

11:45 a.m. .50 hr

NFA Firearms and Gun Trusts

Discuss the basics of owning suppressors, machine guns, and other firearms regulated by the NFA. Hear the legal aspects of forming trusts to own NFA firearms, including lethal pitfalls in drafting them.

Sean P. Healy, Healy Law Offices, P.C., Tyler, TX

12:15 p.m. 30-Minute Break and Vendor Announcements

12:45 p.m. .75 hr | .25 hr ethics

Navigating Informal Marriage and Putative Spouse Claims in Texas Probate

Texas recognizes two informal paths to spousal status that frequently collide in probate proceedings: informal (or common law) marriage and the newly codified doctrine of the putative spouse.

Hon. Jerry Simoneaux, Harris County Probate Court 1, Houston, TX

Joellen Snow, Attorney at Law, Houston, TX

1:30 p.m. .75 hr | .25 hr ethics

Modern Confidence Schemes: Protecting Your Elderly and Wealthy Clients from Financial Abuse, Scams, Exploitation and Criminal Threats

This presentation raises awareness about elder financial abuse, introduces case examples and types of scams, discusses investigative remedies and equips attorneys to be proactive in defending against criminal enterprises.

Bryan Dehan, The Akeeli Group, Houston, TX
Michele Kosoy Goldberg, Attorney at Law, Bellaire, TX

2:15 p.m. .50 hr

The Right Fit Matters: Counseling Clients on Selecting a Corporate Trustee

Selecting a corporate trustee is one of the most important (and often overlooked) decisions in trust planning. This presentation provides tools and information to assist in guiding clients beyond just fee schedules to evaluate what truly matters: expertise and performance, service model, flexibility/adaptability, and long-term fit. Materials include key factors clients should consider and questions to ask when interviewing corporate trustees, as well as practical tips for individuals serving with corporate co-trustees.

Theresa A. Clarke, Kean Miller LLP, Houston, TX
Anna M. Méndez, Huntington National Bank, Austin, TX

2:45 p.m. 10-Minute Break

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The Arc of Texas
MASTER POOLED

trust

2:55 p.m. .75 hr | .25 hr ethics

Medicaid Trusts: A Texas Primer

Hear an overview of the various types of trusts used in Medicaid in Texas, their rules, requirements, and use cases.

Jennifer L. Coulter, Townsend Allala, Coulter & Kludt, PLLC, El Paso, TX
John B. Henry III, Law Office of John B. Henry, III, PLLC, Bellaire, TX

3:40 p.m. .75 hr | .25 hr ethics

No, You Can't Do That with a Trust: Recognizing Scam Trusts Before Clients Get Involved

This program provides a detailed examination of abusive trust arrangements known as "non-grantor, complex, irrevocable, discretionary, spendthrift" trusts, and explains why these structures fail under federal income tax law. The session also offers practical guidance for advising clients who have been drawn into these schemes and for navigating related ethical considerations.

John R. Strohmeier, Strohmeier Law PLLC, Houston, TX

4:25 p.m. Adjourn

NASBA

The University of Texas School of Law is registered with the National Association of State Boards of Accountancy (NASBA) as a sponsor of continuing professional education on the National Registry of CPE Sponsors. State boards of accountancy have final authority on the acceptance of individual courses for CPE credit. Complaints regarding registered sponsors may be submitted to the National Registry of CPE Sponsors through its website: www.nasbaregistry.org.

Earn up to 18.00 credits.

Field of Study: Specialized Knowledge

Delivery Method: Group-Live and Group-Internet

Program Level: Intermediate and Advance

Advanced Preparation: None

Prerequisite: A foundational understanding of estate planning, guardianship, elder law, or related legal and financial disciplines.

Learning Objectives: Analyze recent tax law changes, penalties, and planning considerations impacting estates, trusts, and Medicaid eligibility, and apply those updates to client-specific tax strategies.

Evaluate complex estate planning scenarios involving business interests, cross-border assets, and advanced planning structures to determine appropriate wealth preservation and transfer strategies.

Assess ethical risks, including financial exploitation, scam trust arrangements, and fiduciary responsibilities, and apply professional standards to safeguard clients and ensure compliance.

Analyze client capacity, guardianship requirements, and alternatives, incorporating legal, medical, and procedural considerations into decision-making.

Apply emerging technologies, including artificial intelligence and digital tools, to enhance efficiency, accuracy, and client service in estate planning and elder law practice.

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

Are you a 1st or 2nd year attorney? Attend most UT Law CLE conferences for just \$195!

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UT Law CLE is committed to Practice Excellence.

We are here to support our community. Information and updates regarding our in-person conferences and live webcasts will be posted at 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.



REGISTRATION FORM

ERT26/ER26

Register:
www.utcle.org/conferences/ERT26
www.utcle.org/conferences/ER26

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

WEDNESDAY

**TX NAELA SUMMER CONFERENCE
(OPEN TO TX NAELA MEMBERS ONLY)**

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

- Live, In-Person Registration . . . \$345 | \$445 after July 15
- Wednesday Guest Meal Package (limit 5) . . . \$60 x _____

Printed and Shipped Binder with Registration (Shipping Included) – Available for order through July 29, 2026
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) . . . \$102.84 (\$95*)

Wednesday Registration Subtotal \$ _____

THURSDAY AND FRIDAY

**UT LAW ESTATE PLANNING, GUARDIANSHIP
AND ELDER LAW CONFERENCE**

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

- Live, In-Person Registration . . . \$775 | \$875 after July 15
- Live Webcast Registration . . . \$875
- Thurs–Fri Guest Meal Pass (limit 5) . . . \$95x _____
- Thursday Evening "Fun with Frost" Poolside Dessert Bar & Cocktails RSVP . . . Free x _____

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Webcast Add-on

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

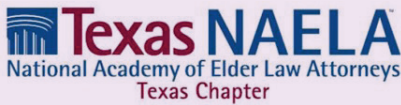
- Webcast Add-on . . . \$100

Thursday and Friday Registration Subtotal \$ _____

REGISTRATION SUBTOTAL FOR ALL THREE DAYS \$ _____

TX NAELA MEMBERS — SAVE \$100 WITH REGISTRATION FOR BOTH CONFERENCES

-\$100 \$ _____



**Want to join NAELA?
Visit www.TexasNAELA.com**

Can't make the live conference? Consider post-conference options

UT Law 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 . . . \$875

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) . . . \$319.34 (\$295*)
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GALVESTON

July 29, 30–31, 2026

CONFERENCE LOCATION



Moody Gardens Hotel

Seven Hope Boulevard
Galveston, Texas
409.683.1299 (reservations)

Special Room Rate: \$217

good through July 7
reference "UT Law CLE Elder Law Conference"
(subject to availability)

Parking:

Complimentary surface parking. Valet parking is
available at \$25 per car, per evening.

KEY DATES

July 15, 2026

Last day for early registration rates

July 24, 2026

Last day for full refund cancellation

July 27, 2026

Last day for partial refund cancellation

\$50 processing fee applied

July 29, 2026

*TX NAELA Summer Conference Begins
Open to Members ONLY*

July 30, 8:20 a.m., CT

Conference begins

July 31, 2026

*Last day to order a printed and shipped course binder
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