

**2006 Changes and Trends Affecting Special Needs Trusts**  
**January 18, 2006 • InterContinental Stephen F. Austin Hotel • Austin, TX**  
**August 9, 2006 • Galveston**

**Wednesday Morning, Jan. 18, 2006**

**Presiding Officers:**

In Austin: **Renee C. Lovelace**, The Lovelace Law Firm, P.C. - Dripping Springs, TX

**Patricia F. Sitchler**, Schoenbaum, Curphy & Scanlan, PC - San Antonio, TX

9:00 am In Austin Only 0.50 hr	<b>Special Needs Trusts Overview</b>  Understanding the purposes and uses of SNTs—how to spot opportunities to use SNTs and analyze the options.  Patricia F. Sitchler, Schoenbaum, Curphy & Scanlan, PC - San Antonio, TX
9:30 am In Austin Only 0.75 hr	<b>Protecting and Maximizing Public Benefits</b>  How to be sure a trust's beneficiary qualifies for the most important disability benefits: Supplemental Security Income, Medicaid, Social Security Disability Insurance and Medicare; and how to manage trust distributions to avoid losing benefits while enhancing the beneficiary's quality of life.  H. Clyde Farrell, Attorney At Law - Austin, TX
10:30 am In Austin Only 0.75 hr	<b>Drafting a Special Needs Trust</b>  Different drafting provisions for Special Needs Trusts: when to use them, federal law requirements and Texas-specific issues.  Pi-Yi Mayo, Law Office of Pi-Yi Mayo - Baytown, TX
11:15 am In Austin Only 0.75 hr	<b>Funding Special Needs Trusts</b>  Presentation will cover the options and the steps for funding the SNT with cash, real property, structured settlement annuities and litigation awards.  Deborah A. Green, Law Offices Of Deborah Green - Austin, TX

**Wednesday Afternoon, Jan. 18, 2006**

**Presiding Officer:**

In Austin: **Renee C. Lovelace**, The Lovelace Law Firm, P.C. - Dripping Springs, TX

12:15 pm In Austin Only 0.75 hr	<b>Lunch Presentation: National Cases and Trends Involving Special Needs Trusts</b>  An overview of cases around the country that impact Special Needs Trusts, and that help predict future drafting and administrative options.  Katherine N. Barr, Sirote & Permutt, P.C. - Birmingham, AL
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1:15 pm In Austin Only 0.75 hr	<p><b>People First: Promoting the Beneficiary's Independence and Quality of Life</b></p> <p>Understanding the beneficiary's needs, resources, objectives, and other specific circumstances is the first step in maximizing options when drafting, funding and administering a Special Needs Trust.</p> <p>Renee C. Lovelace, The Lovelace Law Firm, P.C. - Dripping Springs, TX</p>
2:00 pm In Austin Only 0.75 hr	<p><b>Administering a Special Needs Trust: The SNT Distribution Plan</b></p> <p>Discussion of distribution options, how the attorney and trustee can work together to develop annual distribution plans, alternatives to address beneficiary needs, and public benefits eligibility requirements. Other issues such as who is responsible for filing taxes, allocation of responsibilities, and personal interactions will also be discussed.</p> <p>Patricia F. Sitchler, Schoenbaum, Curphy &amp; Scanlan, PC - San Antonio, TX Nancy Sosa, Encore Trust Company - Austin, TX</p>
3:00 pm In Austin Only 0.75 hr	<p><b>Recent Changes in Trust Law</b></p> <p>This session addresses changes in the Texas Trust Code and other legislative updates with special emphasis on how the recent changes in Texas trust law affect drafting and administering court-created trusts.</p> <p>Glenn M. Karisch, Austin, TX Shari M. Scholten, Wells Fargo/The Private Bank - Austin, TX</p>
3:45 pm In Austin Only 0.75 hr	<p><b>Fixing Problems with Special Needs Trusts</b></p> <p>An overview of the many things that can go wrong with SNTs and how to fix many of these problems.</p> <p>Ronald R. Cresswell Esq., Locke Lord Bissell &amp; Liddell LLP - Dallas, TX</p>