



THE UNIVERSITY OF TEXAS SCHOOL OF LAW
AND THE WEALTH MANAGEMENT AND TRUST
DIVISION OF THE TEXAS BANKERS ASSOCIATION



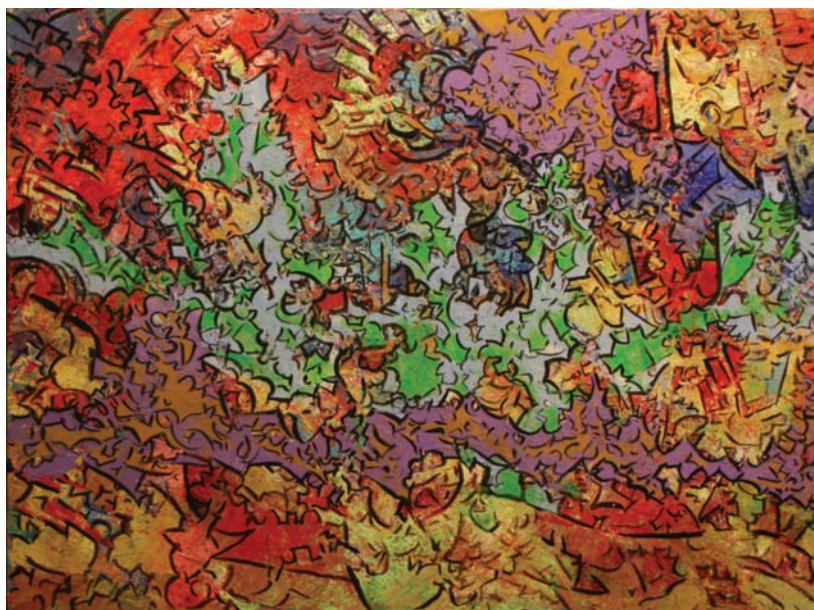
2008

CHANGES AND TRENDS AFFECTING SPECIAL NEEDS TRUSTS

A Guide for Attorneys, Financial Advisors and Trust Officers

Attorneys: Earn up to 11.50 Hours of MLCE Credit including 2.00 Hours of Ethics
Accountants: Earn up to 13.00 Hours of CPE Credit

This course has been accepted for credit by the CFP Board
Specialization Expected for: Estate Planning & Probate Law; Tax Law



January 31-February 1, 2008
Radisson Austin North
Austin, Texas

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THURSDAY AFTERNOON – JAN. 31, 2008

Presiding Officer:

Patricia F. Stichter, San Antonio, TX

12:00 p.m. Registration Opens

Includes complimentary refreshments.

12:50 p.m. Welcoming Remarks

1:00 p.m. .75 hr including .25 hr ethics

Special Needs Trust Overview

An overview of self-settled and third-party SNTs—how they work, when to use them and related ethical issues.

Randy Drewett, Beaumont, TX

1:45 p.m. .75 hr including .25 hr ethics

Protecting and Maximizing Public Benefits

Planning options—and related ethical issues—to ensure 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, Austin, TX

2:30 p.m. 1.00 hr

Estate Planning for the Incapacitated Family Member

This session discusses a wide range of estate planning essentials, including current disability planning documents and forms such as durable power of attorney, medical power, directive to physicians, HIPAA authorization, and Designation of Guardian If Need Arises; advice and planning for parents of disabled children including testamentary or inter vivos SNTs, appointment as guardian when a disabled child attains age 18, etc.; and a discussion of long-term care insurance products currently on the market, including key features which should be included in those insurance contracts.

Ronald R. Cresswell, Dallas, TX

3:30 p.m. Break

3:45 p.m. .50 hr

Court-Created Trusts including the 142 Trust Statute

This presentation focuses on one of the most common ways to create a first-party special needs trust—using a court-created trust. It will focus particularly on trusts created under Section 142.005 of the Texas Property Code and will cover the significant changes to that statute that became effective September 1, 2007.

Glenn M. Karisch, Austin, TX

Commentator: Deborah A. Green, Austin, TX

4:15 p.m. .75 hr including .25 hr ethics

The Changing Face of the Traditional Special Needs Trust

This presentation discusses creative opportunities and expanded uses for Special Needs Trusts, including utilizing SNTs in family law cases to receive and hold court-ordered support for children and spouses with special needs, the ins and outs for the Trustee of handling trust distributions of support funds, and associated ethical issues to be considered.

Deborah A. Green, Austin, TX

Commentator: Glenn M. Karisch, Austin, TX

5:00 p.m. .75 hr

Amending the Special Needs Trust

This presentation will address the issues that arise in conjunction with the process of amending special needs trusts and will include sample pleadings.

Wesley E. Wright, Bellaire, TX

5:45 p.m. Adjourn

FRIDAY MORNING – FEB. 1, 2008

Presiding Officer:

Shari M. Scholten, Austin, TX

7:00 a.m. Conference Room Opens

Includes continental breakfast.

7:30 a.m. .75 hr ethics

Optional Ethics Breakfast The Noble Lawyer

Ethics and professionalism viewed from the perspective of the bar throughout history.

William J. Chriss, Austin, TX

8:15 a.m. Break

8:30 a.m. 1.25 hrs including .25 hr ethics

Advising Trustees on Trust Distributions in Desperate Circumstances: When Every Call is an Emergency

A care manager, trustee, and attorney discuss how to serve a trust beneficiary's best interests when working on cases with too little money, too many needs, and constant crises. The session includes how to promote a higher level of benefits for the beneficiary and work to reduce stress for the beneficiary, family, advocates, and service providers; plus addressing capacity questions, family demands, and challenging beneficiary requests.

Leah Cohen, Austin, TX

Renee C. Lovelace, Dripping Springs, Austin, Dallas, TX

Nancy Sosa, Austin, TX

9:45 a.m. .50 hr

Sustainable Home Care Plan: Is it an Oxymoron?

A sustainable care plan organizes the full range of available Medicare/Medicaid benefits offered, plus additional services which include care coordination, acute medical care, social/recreational activities, prescription drug benefits, chronic care benefits covering nursing home care, and a full range of home and community-based services such as homemaker, personal care services, respite care, and transportation. Other pieces include the client and family's approach to problem-solving, assistive devices, home modification, eyeglasses, hearing aids, and dental care. Melding these disparate pieces into a service delivery system and keeping it going is sometimes a Herculean task. This presentation will give participants strategies to work toward that elusive goal.

Leah Cohen, Austin, TX

10:15 a.m. Break

10:30 a.m. 1.50 hrs including .25 hr ethics

Housing, Housing, Housing: Ownership, Occupancy, Maintenance and Expansion

This session examines many of the housing issues facing attorneys and trustees of special needs trusts. Who should own the home? How should the home be titled? How should an attorney or trustee manage trust distributions for building and maintaining

a home? How can one deal with non-paying family member renters and other common issues? And how can attorneys, trustees and architects team up to manage housing issues more effectively?

Moderator: Pi-Yi Mayo, Baytown, TX
B. Bailey Lipfert, III, Winston-Salem, NC
Karen Kirks Alexander, Salisbury, NC
Commentators:
Renee C. Lovelace, Dripping Springs, Austin, Dallas, TX
Nancy Sosa, Austin, TX
Texas Real Estate and Probate Expert TBA

FRIDAY AFTERNOON

Presiding Officer:

Renee C. Lovelace, Dripping Springs, Austin, Dallas, TX

LUNCHEON PRESENTATION

12:00 p.m. Pick up Box Lunch

Included in conference registration fee.

12:15 p.m. .75 hr

SNT Case Law Update

This presentation will cover recent cases involving special needs trusts as well as other cases of note.

Rebecca C. Morgan, Gulfport, FL
Mary Alice Jackson, Sarasota, FL

1:00 p.m. Break

1:15 p.m. .75 hr

Planning for Children with Special Needs Trusts

The presentation will highlight Medicaid benefits available to children with disabilities, and to children of needy families, plus trusts and other planning techniques that can be implemented to protect both types of Medicaid benefits. Additionally, the presentation will include an overview of possible trust distributions focused on providing the highest quality of life for these little ones.

Patricia F. Stichler, San Antonio, TX

2:00 p.m. 1.00 hr

Agency Panel:

Questions, Answers and Options

A panel of government experts will address emerging issues arising in such programs as Supplemental Security Income, Medicaid and Medicaid Estate Recovery.

Moderator: Patricia F. Stichler, San Antonio, TX
Beth Brown, Dallas, TX
Shari Nichols, Austin, TX
John Stockton, Austin, TX

3:00 p.m. .50 hr

When Good Trusts Go Bad

How to handle an appeal when your trust is turned down by the Social Security Administration.

Pi-Yi Mayo, Baytown, TX

3:30 p.m. Adjourn

Online Courses www.utcle.org

REGISTRATION FOR SN08

Mail this registration form to:

The University of Texas School of Law, Attn. SN08
P.O. Box 7759, Austin, TX 78713-7759 **or fax a copy to: (512) 475-6876**
Online registration available at www.utcle.org

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Assistant's Email (optional) _____

Invoices, confirmations and receipts are emailed to these addresses.

REGISTRATION

Includes Course Binder and Friday Box Lunch Presentation

- ☐ Early Registration Fee due by Wed., January 23, 2008 \$375.00
☐ Registration Fee after Wed., January 23, 2008 \$425.00

CONFERENCE PUBLICATIONS AND MEDIA

Allow 2-4 weeks from Austin conference date for delivery.

- ☐ Course Binder WITHOUT Conference Registration \$200.00
☐ Audio CD Set \$175.00
☐ eBinder on CD (PDF format) \$200.00/\$50.00
(\$200 purchased alone, \$50 with registration or purchase of Course Binder or Audio CD Set)

IN-HOUSE CLE: Bring the conference in-house and learn at your convenience.

Allow 2-4 weeks from Austin conference date for delivery.

- ☐ In-House CLE for 2—Includes Audio CD Set and 2 Course Binders \$750.00
_____ Add participants (includes Course Binders) for \$200 each \$ _____

TOTAL ENCLOSED \$ _____

METHOD OF PAYMENT

- ☐ Check (make checks payable to: The University of Texas at Austin)
☐ VISA or ☐ Mastercard (sorry, no AMEX or Discover)

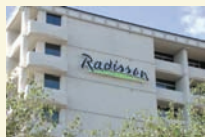
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Authorized Signature Exp. Date (mm/yy)

AUSTIN

January 31-February 1, 2008

CONFERENCE LOCATION



Radisson Austin North

6000 Middle Fiskville Road
Austin, TX 78752
512-451-5757

Special room rate \$85
good through January 9, 2008
(subject to availability).

Parking: self-parking
complimentary (subject to change)

KEY DATES

Registration & Cancellation

January 23, 2008–5 p.m.
last day for early registration
add \$50 for registrations
received after this time

January 25, 2008–5 p.m.
last day for full refund

January 28, 2008–5 p.m.
last day for partial refunds
\$50 processing fee applied

January 31, 2008–1 p.m.
conference begins

CONFERENCE FACULTY

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Salisbury, NC

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Social Security Administration
Dallas, TX

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Texas Center for Legal Ethics and
Professionalism
Austin, TX

LEAH COHEN
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Austin, TX

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RENEE C. LOVELACE
The Lovelace Law Firm, P.C.
Dripping Springs, Austin, Dallas, TX

PI-YI MAYO, CELA
Law Office of Pi-Yi Mayo
Baytown, TX

REBECCA C. MORGAN
Stetson University College of Law
Gulfport, FL

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Texas Health and Human Services Commission
Austin, TX

PATRICIA F. SITCHLER, CELA
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Wealth Management & Trust, a Division of the Texas Bankers Association, is a one-of-its-kind state organization dedicated to serving the unique needs of wealth management, trust and estate planning organizations and professionals.

We offer a diverse menu of continuing education events such as our Annual Conference (March 26-28, Fort Worth), our Planning for Persons with Disabilities Seminar (June 13, San Antonio), and our Advanced Trust Forum (November 6-7, San Antonio). We also offer news, professional reference publications and advocacy products and services. To learn more about us, please visit our Web site: www.texasbankers.com/trust

ABOUT THE COVER



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information, call
512-499-8357

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This course has been approved for Minimum Continuing Legal Education credit by the State Bar of Texas Committee on MCLE in the amount of 11.50 hours, of which 2.00 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).

E-mail us at

utcle@law.utexas.edu

or call us at

512-475-6700

for more information

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