EXCLUSIVE RECEPTION SPONSOR

Happy State Bank and Trust Co. | happybank.com/

"The town without a frown," Happy, Texas, got its first bank in 1908, then called First State Bank of Happy. In 1989, 10 local families from Canyon, Texas purchased the $10 million dollar bank that was listed as the 812th largest bank in Texas. Happy State Bank is now the 20th largest bank with 35 branches in 25 markets, and an asset size of $3.4 billion. In addition to being named a "Best Banks to Work For" five years in a row by *American Banker*, Happy is ranked the 3rd Best Bank in Texas and the 26th Best Bank in the Nation by *Forbes*. The Happy Trust Company was added in 2002 and currently manages over 400 million dollars in assets. Happy's trust team has over 300 years of combined experience providing expertise in farm and ranch management, securities portfolio services, and mineral interest oversight. Consistent with Happy State Bank's mission, the trust company thrives on building personal relationships with our clients while providing the highest level of fiduciary service.

EXCLUSIVE FRIDAY LUNCHEON SPONSOR

ElderCounsel, LLC | eldercounsel.com

ElderCounsel is dedicated to the professional development and full practice support of elder law attorneys through education, document drafting, collegiality, marketing and business solutions. Being an attorney is very different from running your own law firm. ElderCounsel helps attorneys keep up in an ever-changing elder law environment and sustain a successful practice.

EXCLUSIVE THURSDAY LUNCHEON SPONSOR

Legacy Enhancement Trust | legacyenhancement.org/

Legacy Enhancement is a national non-profit corporation established to assist individuals who are disabled or have special needs. The goal of our special needs trust is to protect you and your loved ones' current and future assets by managing funds for supplemental needs and enriching your overall quality of life. Your trust fund will be professionally managed and invested to provide long-lasting security and support. We strive to retain any public entitlements you or your loved one are owed, and work to assist with the needs not covered by benefits or insurance. Legacy Enhancement can assist you with every aspect involved in trust administration; including establishment of the trust, funds disbursement and bill pay, nurse care management, benefits coordination, and much more.

EXCLUSIVE WEBCAST SPONSOR

American National Bank of Texas - Trust Dept. | anbtx.com

At American National Bank of Texas, our values have served us well since 1875. Doing the right thing for our customers and employees is at the core of everything we do. In 1926 we expanded to include Trust Services, to meet the changing needs of our clients. Our Trust Department is filled with seasoned financial professionals who seek to build lifelong partnerships with our clients and their families. The only way to get to know a Trust Department is to spend time with its people – and our customers enjoy the personal relationships and attention we provide. Our approach to trust administration is especially well suited to Special Needs Trust beneficiaries and their families. We are dedicated to providing the additional time and expertise necessary to fully understand and meet the needs of our beneficiaries throughout their lifetimes. We serve throughout the state of Texas, and look forward to working with you!

CONFERENCE SPONSOR

Austin Trust Company | austintrust.com/

Austin Trust Company was the first private trust company to be chartered by the Texas Department of Banking, receiving charter number T-001 in 1987. We remain the only locally owned and controlled institution that offers a full range of fiduciary services. Whether you have a straightforward trust, a copious, detailed estate or are establishing a Special Needs Trust to help a loved one living with a disability maintain their eligibility for benefit programs, we are here for you. To find out more about how we strive to go Beyond Money Management, please visit us at austintrust.com.

CareFor | carefor.com/

Frost Wealth Advisors | frostbank.com/pages/personal-investments.aspx
Frost is the banking, investments and insurance subsidiary of Cullen/Frost Bankers, Inc. (NYSE: CFR), a financial holding company with $50 billion in assets at June 30, 2022. One of the 50 largest U.S. banks by asset size, Frost provides a full range of banking, investments and insurance services to businesses and individuals in the Austin, Corpus Christi, Dallas, Fort Worth, Houston, Permian Basin, Rio Grande Valley and San Antonio regions. Founded in 1868, Frost has helped Texans with their financial needs during three centuries. For more information, visit www.frostbank.com.

Medivest Benefit Advisors, Inc. | medivest.com/

Medivest is a national Medicare Secondary Payer (MSP) compliance company. In 1996 we were the first company to professionally administer a Medicare Set-Aside arrangement. For over 24 years Medivest has been an innovator, creating pre-settlement and post-settlement solutions. Our experienced claims professionals, using state of the art software, adjudicate bills in a quick and timely manner. In addition to Professional Administration, Medivest provides other services including preparing MSA Allocation reports, Lien Resolution, verifying Social Security/Medicare eligibility, and Trust Advisor services. For more information on Medivest please visit www.medivest.com.

National Care Advisors | nationalcareadvisors.com

National Care Advisors, founded in 2008, is a national nurse consulting firm providing life care planning, quality of life assessment, third-party benefit analysis, educational and litigation consulting as well as case management services for individuals with special needs and disabilities.

We work with attorneys, financial planners, trustees and their client families in all 50 states to navigate the complex financial and legal climate surrounding insurance, government benefits, and future cost projections. Sustainable quality of life should be attainable for any who seek it, no matter their abilities or special needs. Our case managers and consultants work to maximize quality of life within the available scope of resources. Learn more about us at www.nationalcareadvisors.com

WELLS FARGO Wealth & Investment Management

Wells Fargo Bank Special Needs Trust Services | wellsfargo.com/the-private-bank/solutions/specialized/special-needs-trustservices/

At Wells Fargo, the administration of Special Needs Trusts has been a core business offering since 1996. Currently, we serve over 1,200 clients and their families nationwide. To ensure that our clients receive knowledgeable and responsive service, Wells Fargo has assembled a dedicated team of fiduciary professionals who administer Special Needs Trusts, and other trusts, such as Settlement Preservation Trusts, for beneficiaries living with disabilities. This team works closely with other Wells Fargo professionals, including investment managers, to meet clients' needs and goals. Wells Fargo assists clients with developing a budget and paying bills, coordinates tax payments, and connects clients with services and resources such as care managers and home health agencies. At Wells Fargo, our mission is to help our clients lead more comfortable, secure, and fulfilled lives.

EXHIBITORS

Bank of Texas

Family Tree Private Care

Mir Senior Care Management Inc. & Care Consultants