UT LAW CLE Continuing Legal Education

eConference
2025 Estate Planning, Guardianship and Elder Law eConference

Session 1 0.75 hr | 0.25 Ethics	**How Do We Practice Law?** Have you ever wondered how other attorneys handle the practical aspects of managing clients and cases? Do other attorneys store original documents for clients? Are will-reading ceremonies a thing? This presentation discusses survey results from Texas attorneys in this practice area. **Dianne Reis,** Attorney at Law - Plano, TX
Session 2 0.50 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
Session 3 0.50 hr	**TRS Beneficiary Designations: Simple Rules, Big Consequences** From outdated forms to unintended heirs, TRS beneficiary designations can create surprising pitfalls for your clients. This session covers the essential rules, common mistakes, and smart planning strategies to ensure TRS benefits align with your clients' estate plans. **Lindsey James-West,** LKJ Financial - Houston, TX
Session 4 0.75 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
Session 5 0.50 hr	**Handling Special Assets in Planning and Administration** Explore how to plan for and administer special assets, including minerals, business interests, crypto, cattle, and promissory notes. **Adrianne Graves,** Graves Law PLLC - Houston, TX
Session 6 1.00 hr | 0.25 Ethics | 0.50 Guardianship	**Recognizing Potential Incapacity of a Client** Discuss how to recognize potential incapacity in clients and the limitations any such incapacity causes. The discussion includes identifying the varying levels of capacity, steps that can be taken to identify capacity, and the types of incapacity a person may suffer from. **Jessica L.D. Guobadia,** Crain Caton & James - Houston, TX **Dr. Christopher Merkl,** Houston, TX
Session 7	**Lesser Restrictive Alternatives / Supports and Services to Guardianship: A Guide for a Practical Practice**

1.00 hr | 0.50 Ethics | 1.00 Guardianship	Discuss lesser alternatives to guardianships including power of attorneys, representative payees, care managers, and 1301 management trusts, and other creative alternatives when dealing with legal issues or assets in other jurisdictions. **Hon. Amy Rigby Parsons,** Harris County Probate Court #3 - Houston, TX **Andrea Lee Uresti Barr,** Barr Law, PLLC - Sugar Land, TX **Tara Zinn,** Harris County Probate Court #3 - Houston, TX
Session 8 0.75 hr	**When and How to Enroll in Medicare Parts A, B, C, D** This presentation covers when beneficiaries should enroll in Medicare, the differences between Parts A, B, C, and D, and the process and deadlines for enrolling in each. **Pi-Yi Mayo,** Mayo & Poland PLLC - Baytown, TX
Session 9 0.50 hr	**Estate Planning for Ranch Owners** Does your ranch-owning client plan to liquidate it or keep it in the family for generations to come? Learn practical planning strategies to address multi-generational ownership, liability protection needs, and desired tax treatment of the family ranch. **Tanya E. Feinleib,** Langley and Banack, Inc. - San Antonio, TX
Session 10 0.50 hr | 0.25 Ethics	**Pitfalls and Problems with Licensed Legal Paraprofessionals** A discussion of the current status of the Texas Supreme Court’s proposed rules regarding Licensed Legal Paraprofessionals, the issues presented by LLPs, and some alternative solutions. **Ruth-Ann Toups,** The Toups Law Firm - Spring, TX
Session 11 0.75 hr | 0.75 Ethics	**Ethics and Practical Uses of AI in Your Law Practice** This presentation explores the ethical and practical uses of AI in estate planning, guardianship, and elder law, offering guidance on current AI tools and leveraging AI while upholding professional responsibilities. It examines AI's potential to automate tasks, improve efficiency, and enhance client service while addressing ethical considerations and relevant ABA rules, including billing for AI-related services. **Greg Lambert,** Jackson Walker LLP - Houston, TX
Session 12 0.75 hr	**Medicaid Asset Protection Trusts** Learn how Medicaid Asset Protection Trusts can be strategically utilized to help your clients qualify for long-term care benefits while preserving assets and avoiding trust-busting traps. **Lisa Shoalmire,** Ross & Shoalmire PLLC - Texarkana, TX
Session 13 0.75 hr | 0.75 Guardianship	**A Toolkit for Contested Guardianships** This session provides you with guidance, forms, and strategy considerations to help you be successful in your next contested guardianship case. **Christopher C. Burt,** BoyarMiller - Houston, TX
Session 14 0.50 hr	**Ask an HHSC Representative** Gain insight on a variety of topics including the processing of client applications, utilizing the 211-call system, setting up an online account on yourtexasbenefits.com and the loading of large attachments.

	Leslea Tate Pickle, Texas Health and Human Services Commission - Austin, TX
Session 15 0.75 hr | 0.50 Guardianship	**The Four-Step Process for Sale of Property** Whether Guardianship, Dependent Administration or Sale of a Ward's (Minor's) property without Guardianship, there are legislative requirements and title underwriter requirements in relation to the documents that have to be filed with the courts to obtain permission to sell real property owned. Discuss applications, time limitations, verified accountings, reasons for selling and Deeding requirements. **Thad Barreneche,** Title Resources Guaranty - Dallas, TX **Pam Keever,** Keever & Wiesenthal and American Title Company of Houston - Houston, TX **Kathleen Schultz Wiesenthal,** Keever & Wiesenthal - Houston, TX
Session 16 0.50 hr | 0.25 Guardianship	**Working with Adult Protective Services** Elder Law, Guardianship and Estate Planning attorneys frequently encounter family members who are either alleged victims or alleged perpetrators of abuse, neglect, and/or exploitation. This session provides attorneys with a framework of reference for how Texas Adult Protective Services performs its investigations and recommendations on how to best accomplish successful outcomes when confronted with an APS investigation. **Terry W. Hammond,** Kemp Smith, LLP - El Paso, TX **Laura Palmquist,** Texas Department of Family and Protective Services - Austin, TX
Session 17 0.75 hr	**Legislative Update** Update on new legislation impacting estate planning, guardianships, trusts and related practice areas. **Lauren Davis Hunt,** Osborne, Helman, Scott, Knisely & Stanton L.L.P. - Austin, TX
Session 18 1.00 hr | 1.00 Guardianship	**Representing Proposed Wards: How Disorganized is Legally Disorganized?** Hear strategies to employ when your proposed ward has capacity (or partial capacity) and ways to work with the applicant's attorney to protect the rights of your proposed ward. **Lauren Olson,** Leu, Peirce, & Olson, PLLC - Plano, TX **Kathleen Schultz Wiesenthal,** Keever & Wiesenthal - Houston, TX
Session 19 0.75 hr | 0.25 Ethics	**Death and Fraud on the Community** Explore the fundamentals of fraud-on-the-community claims, including a discussion of the claim's origins, elements, defenses, remedies, related causes of action, and practical examples from Texas cases. **Eric Bean,** Ferguson Braswell Fraser Kubasta PC - Houston, TX
Session 20 1.00 hr | 0.25 Ethics	**SECURE Act Final Regulations: Planning for Distribution of Retirement Assets** Discuss notable provisions in the SECURE Act Final Regulations relating to retirement assets from an estate planning perspective. In particular, evaluate naming trusts as beneficiaries of retirement assets. **Karen S. Gerstner,** Karen S. Gerstner & Associates, P.C. - Houston, TX
Session 21 0.75 hr | 0.50 Ethics	**Protecting the Client and Their Plan from Interlopers and Do-Gooders**

When other advisors, family, and friends involve themselves in the estate planning process they may help or interfere, or both. This presentation addresses the ethical and practical issues that result and offers real world solutions that put the client's interests and goals first.

John Mark Comuzzie, Jackson Walker LLP - San Antonio, TX
Bernard E. ("Barney") Jones, Attorney at Law - Houston, TX