UT LAW CLE Continuing Legal Education

## eConference

# 2018 Estate Planning, Guardianship, and Elder Law eConference

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| Session 1<br>0.75 hr | **IRA, UTMA, SNT, RMD… OMG! Special Considerations When Planning With Retirement Benefits For Minors and Incapacitated Individuals.**<br><br>Hear a presentation focusing on special planning considerations when a retirement plan's desired beneficiary is a minor, is incapacitated or is likely to have some degree of future incapacity.<br><br>**Katherine C. Akinc,** Brink Bennett Flaherty Golden - Austin, TX |
| Session 2<br>0.75 hr | **Medicaid-Friendly Estate Planning**<br><br>Discuss forms and strategies for preparing your clients (and sometimes their parents and children) to protect assets in case the need for long-term care arises. Forms will be provided and explained for Lady Bird Deeds, Transfer on Death Deeds, Revocable Trust as Grantee (of either type deed), and Medicaid-Friendly Contingent Trust.<br><br>**H. Clyde Farrell,** Farrell, Burdett & Johnson PLLC - Austin, TX |
| Session 3<br>0.75 hr | **Durable Power of Attorney Update**<br><br>Hear highlights of the new Statutory Durable Power of Attorney statute.<br><br>**Patricia F. Sitchler,** The Law Office of Patricia Flora Sitchler - La Vernia, TX |
| Session 4<br>0.75 hr | **Advising Clients Nearing 65**<br><br>Turning 65 can be a watershed event in our client's lives. They face many decisions about retirement, concerning Medicare, Social Security, and estate planning. Get tips to help you prepare to advise your clients about some of these important decisions.<br><br>**Pi-Yi Mayo,** Mayo & Poland PLLC - Baytown, TX |
| Session 5<br>0.75 hr | **After 65: Second Chances for Inheritance and Long-Term Care Planning**<br><br>Address planning options that become unavailable or difficult after age 65 and some of the valuable options for planning that remain available. Key planning options include planning by parents and other family, as well as the modification of wills and trusts to improve beneficial interests.<br><br>**Renée C. Lovelace,** The Lovelace Law Firm, P.C. - Austin, TX |
| Session 6<br>0.75 hr \| 0.25 Ethics | **Sex and Romance (50 Shades of Silver): Rights, Reservations, and Ethics**<br><br>Discuss if, when, and how to intervene in the intimate lives of clients.<br><br>**Mary Alice Jackson,** Mary Alice Jackson, P.C. - Austin, TX |
| Session 7<br>0.50 hr | **View from the HHSC**<br><br>Hear the Texas Health and Human Services Commission (HHSC) address current issues in long-term care Medicaid eligibility. |

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| | **Shari L. Nichols,** Texas Health and Human Services Commission - Austin, TX |
| Session 8<br>1.00 hr \| 0.50 Ethics \| 1.00 Guardianship | **Alternatives to Guardianship and Supports and Services**<br>An examination of strategies on how to limit or obviate the need to create a guardianship.<br>**Craig Hopper,** Hopper Mikeska, PLLC - Austin, TX<br>**Richard Lavallo,** Disability Rights Texas - Austin, TX |
| Session 9<br>0.50 hr \| 0.50 Guardianship | **Practical Ways for Guardians and Caregivers to Prevent Scams and Exploitation**<br>Hear a review of the most recurring scams targeting the elderly. Discuss legal recourses available for preventing an elderly individual from losing their entire estate to a scam.<br>**Hon. Donald W. Dowd,** Cass County Court at Law - Linden, TX<br>**Lori Varnell,** Tarrant County Criminal District Attorney's Office - Fort Worth, TX |
| Session 10<br>0.75 hr | **10 Pesky Problems with Real Estate**<br>Identify the ten real estate issues that all estate planners, guardians, and elder law attorneys should be aware of and know how to solve.<br>**Kristen Quinney Porter,** Kristen Quinney Porter, LLC - New Braunfels, TX |
| Session 11<br>1.00 hr | **The State of Texas Unclaimed Property Program: Come and Get It.**<br>Highlight facts about the agency program and discuss best practices for probate attorneys to advise their clients about unclaimed property. Gain insights into the duty of executors/ administrators to escheat unclaimed probated funds to the State, steps elderly clients should take to avoid property being deemed abandoned and reported to the Comptroller as unclaimed property, and the claims process for individuals both before and after death.<br>**Bryant Clayton,** Texas Comptroller of Public Accounts - Austin, TX<br>**David L. Cruz,** Texas Comptroller of Public Accounts - Austin, TX |
| Session 12<br>1.00 hr \| 0.50 Ethics \| 1.00 Guardianship | **Role of the Guardian**<br>Examine the duties and responsibilities of a guardian under Texas law and guardianship administration, from initiation to closing, including the code requirements of selling and leasing property, ethical issues, and more.<br>**Craig Hopper,** Hopper Mikeska, PLLC - Austin, TX |
| Session 13<br>1.00 hr \| 0.50 Ethics \| 1.00 Guardianship | **Role of the Ad Litem**<br>An overview of the responsibilities of the attorney ad litem and guardian ad litem in guardianship proceedings with an emphasis on practical application of the statutes, conduct in uncontested and contested proceedings, and pointers on applications for fees. The materials include numerous checklists, comprehensive references, and forms.<br>**Hon. Steve M. King,** Tarrant County Probate Court One - Fort Worth, TX |
| Session 14<br>1.00 hr | **Heirship Determination**<br>Discuss issues involving heirship determination with or without an administration.<br>**Hon. Guy Herman,** Travis County Probate Court #1 - Austin, TX |

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| Session 15<br>0.50 hr \| 0.50 Guardianship | **The Conundrums: When Guardianship Administration Turns Into Litigation**<br><br>Make note of litigation matters that can arise relating to the administration and settlement of a guardianship estate including, divorce, child support, turn over, breaches of fiduciary duty, and more.<br><br>**Sarah Patel Pacheco,** Crain, Caton & James, P.C. - Houston, TX |
| Session 16<br>1.00 hr \| 0.25 Ethics \| 0.25 Guardianship | **Ask the Experts**<br><br>Hear a panel of seasoned practitioners respond to your frequently—and sometimes infrequently—asked questions including practice, professional and ethical issues in estate planning, probate, guardianship, and elder law.<br><br>**H. Clyde Farrell,** Farrell, Burdett & Johnson PLLC - Austin, TX<br>**Craig Hopper,** Hopper Mikeska, PLLC - Austin, TX<br>**Pi-Yi Mayo,** Mayo & Poland PLLC - Baytown, TX<br>**Marilyn G. Miller,** Marilyn G Miller, Attorney at Law - Dripping Springs, TX |
| Session 17<br>1.25 hrs \| 1.25 Ethics | **The State of Ethics**<br><br>Get an overview of disciplinary proceedings, a review of cases in which the attorney was subject to criminal proceedings, and a review of the trends in malpractice claims.<br><br>**Randy Drewett,** Attorney at Law - Beaumont, TX<br>**James A. Ehler,** Office of the Chief Disciplinary Counsel, State Bar of Texas - San Antonio, TX<br>**Wesley E. Wright,** Wright Abshire, Attorneys - Bellaire, TX |
| Session 18<br>1.00 hr \| 0.25 Guardianship | **Ask the Judges**<br><br>Hear a panel of seasoned probate judges respond to your frequently—and sometimes infrequently—asked questions regarding guardianships and decedent's estates on jurisdiction and procedure, including presiding in small counties where there are no county courts at law.<br><br>**Hon. Gladys B. Burwell,** Senior Statutory Probate Judge - Friendswood, TX<br>**Hon. Guy Herman,** Travis County Probate Court #1 - Austin, TX<br>**Hon. Steve M. King,** Tarrant County Probate Court One - Fort Worth, TX<br>**Hon. Kimberly Ann Willett Sullivan,** Probate Judge - Galveston, TX |