EXCLUSIVE TX NAELA DINNER AND THURSDAY MORNING BREAKFAST SPONSOR

Cadence Asset Management & Trust | cadencebank.com/wealth-management

At Cadence, we believe that a customized wealth strategy plays a critical role in helping clients achieve a fulfilling life and lasting legacy. Averaging 20 years of experience each, our administrative advisors listen first to better understand our client's definition of success, their goals and unique family dynamics. Whether it is planning for retirement, establishing a court-created or special needs trust, developing a customized investment strategy or transferring wealth to the next generation, Cadence's innovative wealth management solutions can help clients overcome roadblocks and build a path to financial success. Cadence Trust & Asset Management has full-service office locations in Houston, Austin and Dallas.

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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!

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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 $52.9 billion in assets on December 31, 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.

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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 Wealth Management, please visit us at austintrust.com.

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Integrity Marketing Solutions | imsrocks.com

Welcome to Integrity Marketing Solutions, where we transform your estate planning or elder law firm into an online powerhouse.

As a boutique, high-end digital marketing agency, we cater exclusively to the unique needs of the estate planning and elder law sectors, ensuring that our expertise is laser-focused on achieving your desired outcomes.

In today's competitive legal landscape, it's crucial to stand out from the crowd, establish trust, and position yourself as the premier choice for clients seeking estate planning or elder law legal services.

That's where we come in. Our comprehensive digital marketing solutions are designed to help your firm dominate your market online, allowing you to focus on what you do best – providing exceptional legal services to your clients.

Let us to help unlock your firm's full potential online.

Experience the difference that a dedicated, high-end digital marketing agency can make for your estate planning or elder law firm.

Together, we'll build an online presence that positions you as the premier choice for legal services in your market.

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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.

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American National Bank & Trust | amnat.com/trust/

American National Bank & Trust strives to provide a comprehensive range of wealth management services to achieve your goals of financial security and success. Only by listening carefully to our clients' dreams, concerns, and unique needs can we develop the appropriate solutions to help achieve each clients' financial and estate planning goals.

Our trust officers have on average more than 23 years of experience and multiple certifications allowing them to deliver the top level of service to our current clients and their future generations. We have expertise in trusts, estate administration, guardianships, 1301 and 142 trusts, special needs trusts, investments, retirement planning, and other individualized wealth management services.

With trust and wealth management offices across the state of Texas and our corporate headquarters in Wichita Falls, Texas, we are able to provide local experts to help your clients with all of their planning needs.

You can find more information about American National Bank & Trust at www.amnat.com.

CONFERENCE SPONSORS

CareFor | carefor.com/

CareFor is a premiere Care Management, Homecare, and Guardianship Program serving Central Texas. We bring compassion and order to the complexity of caring for others. Our team members have been entrenched throughout the medical and caregiving communities in Central Texas for decades. CareFor knows the doctors, service providers, resources and facilities and we have the expertise to support you and your loved ones. Our combined experience and knowledge will help you identify and understand your options and make timely and sound decisions. Whether you need us now, or are planning ahead, CareFor manages the most difficult and immediate needs.

Krause Financial Services | krause.com/

Krause Financial Services is a pioneering, attorney-led financial services firm that specializes in crisis Medicaid planning through the use of Medicaid Compliant Annuities and other insurance products. With over 25 years of experience, we work with elder law attorneys and their clients to accelerate eligibility for benefits and provide relief from the financial hardship of long-term care.

Located just outside Green Bay, WI, we work with attorneys nationwide on their crisis planning cases. We work diligently to ensure we remain up-to-date on all state-specific Medicaid rules and regulations, and our staff of highly-trained Benefits Planners provide one-on-one support for every case our office encounters.

MERRILL
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The Special Needs Team

Merrill: The Special Needs Team – Texas | fa.ml.com/california/modesto/snt/

The Special Needs Team at Merrill Lynch is a deeply experienced group of industry professionals. We are dedicated to helping improve the long-term well-being of individuals who are unable to care for themselves by offering financial advice and guidance. Located in multiple offices, we work closely with private professional guardians and family members to provide budgeting, wealth planning and investing designed to assist those who are integral to the care of society's most vulnerable: people with disabilities, elderly individuals with dementia, accident victims and other special needs populations

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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

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