

19TH ANNUAL
**ESTATE PLANNING, GUARDIANSHIP
AND ELDER LAW CONFERENCE**

August 3–4, 2017
Moody Gardens ■ Galveston, Texas

Earn up to 14.75 Hours of Credit Including 3.25 Hours of Ethics Credit and 4.25 of Guardianship



TX NAELA MEMBERS – COME A DAY EARLY!

TEXAS NAELA SUMMER CONFERENCE

Open to TX NAELA Members ONLY

August 2, 2017
Moody Gardens ■ Galveston, Texas

Earn up to 5.00 Hours of Credit

2017

TEXAS NAELA SUMMER CONFERENCE

Open to TX NAELA Members ONLY

August 2, 2017 ■ Moody Gardens ■ Galveston, Texas

Earn up to 5.00 Hours of Credit

WEDNESDAY AFTERNOON, AUG. 2, 2017

11:00 a.m. Registration Opens

12:00 p.m. Meet the Board:
New Members' Lunch

New to TX NAELA? Meet current members at this informal mixer.

THANK YOU TO OUR
NEW MEMBERS' LUNCH SPONSOR

Wunderlich Securities, Inc.

1:00 p.m. Board Meeting

2:00 p.m. Presentations Begin

Presiding Officer:

Bliss Burdett Pak, Farrell & Pak PLLC,
Austin, TX

2:00 p.m. .75 hr

Dealing with Difficult Behavior

Working with a population with mental health challenges and dealing with difficult behaviors puts any service provider, be they attorney, trust officer, or support staff at risk of dealing with a potentially dangerous situation. Learn how to maintain your safety and the safety of your clients. Identify potential risks, prevent future crisis events, handle immediate danger, and re-establish a working relationship with your client after the behavioral episode.

Robert Pierce, The Law Office of Christina Leshner, PC,
Houston, TX

2:45 p.m. .75 hr

Family Fusion: Estate Planning Beyond the Nuclear Unit

Discuss the approaches an estate planning attorney might employ when working with a blended family, and the various planning techniques that may be utilized.

Kristi N. Elsom, Fizer Beck, Houston, TX

Materials By:

Jovana Popovich, Fizer Beck, Houston, TX

3:30 p.m. Break

3:45 p.m. .75 hr

Preventing and Recovering from Elder Financial Fraud

A detailed analysis of the types of predators and the methods they use to victimize isolated individuals including elderly and intellectually disabled individuals.

Hon. Claudia Lee Laird, Montgomery County Court
at Law #2, Conroe, TX

Darlene Payne Smith, Crain Caton & James,
Houston, TX

4:30 p.m. .75 hr

Unauthorized Practice of Law: How Clients are Being Harmed

Non-attorneys are attempting to assist individuals with qualifying for Medicaid benefits to the detriment of those individuals. This area of the law is highly specialized and complicated and includes tax considerations, fiduciary liability, and other issues. Explore these issues and discuss what can be done to prevent harm to our clients.

Mary Alice Jackson, Mary Alice Jackson, P.C.,
Austin, TX

Marian S. Rosen, Rosen & Spears, Houston, TX
Nathan D. Ziegler, Nathan Ziegler & Associates,
Lubbock, TX

5:15 p.m. Break

WEDNESDAY EVENING

5:15 p.m. Drinks

Join your colleagues for drinks before the Annual Meeting begins.

5:30 p.m. Annual Meeting and
Election of Officers

6:00 p.m. Break for Dinner

TEXAS NAELA DINNER

6:00 p.m.

Included for registrants;
\$75 for non-registrant guests

THANK YOU TO OUR
DINNER SPONSOR

 CADENCE
BANK

6:15 p.m. 1.00 hr

The Tension Between Legal Documents and Medical Practice

Get a view of today's potential collision course between medical and legal practice. Understand how attorneys can keep their clients' documents on track and aligned.

Debbie Pearson, Nurses Case Management & Age
Your Way, Austin, TX

7:15 p.m. Break

7:30 p.m. 1.00 hr

The Future of Elder Law and Estate Planning: Policy and Technology

Hear a panel of distinguished lawyers discuss how policy and technology changes will impact the future of Elder Law and Estate Planning. Specific topics will include the effect of potential Medicaid block grants, the role of technology within the practice, and more!

Moderator:

Mary Alice Jackson, Mary Alice Jackson, P.C., Austin, TX

Panelists:

H. Clyde Farrell, Farrell & Pak PLLC, Austin, TX
Pi-Yi Mayo, Law Office of Pi-Yi Mayo, Baytown, TX
R. Hal Moorman, Moorman Tate Haley Upchurch &
Yates, LLP, Brenham, TX
Patricia F. Sitchler, The Law Office of Patricia Flora
Sitchler, La Vernia, TX

8:30 p.m. Adjourn

M
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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 5.00 hours. The University of Texas School of Law is a State Bar of California approved MCLE provider (#1944).

TX NAELA CONFERENCE FACULTY

KRISTI N. ELSOM
Fizer Beck
Houston, TX

ROBERT PIERCE
The Law Office of Christina Leshner, PC
Houston, TX

H. CLYDE FARRELL
Farrell & Pak PLLC
Austin, TX

JOVANA POPOVICH
Fizer Beck
Houston, TX

MARY ALICE JACKSON
Mary Alice Jackson, P.C.
Austin, TX

MARIAN S. ROSEN
Rosen & Spears
Houston, TX

HON. CLAUDIA LEE LAIRD
Montgomery County Court at Law #2
Conroe, TX

PATRICIA F. SITCHLER
The Law Office of Patricia Flora Sitchler
La Vernia, TX

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

DARLENE PAYNE SMITH
Crain Caton & James
Houston, TX

R. HAL MOORMAN
Moorman Tate Haley Upchurch &
Yates, LLP
Brenham, TX

NATHAN D. ZIEGLER
Nathan Ziegler & Associates
Lubbock, TX

DEBBIE PEARSON
Nurses Case Management & Age
Your Way
Austin, TX

TX NAELA CONFERENCE PLANNING COMMITTEE

BLISS BURDETT PAK—CHAIR
Farrell & Pak PLLC
Austin, TX

ELISA DILLARD RAINEY
Rainey & Rainey, Attorneys at Law LP
Waco, TX

MARY ALICE JACKSON
Mary Alice Jackson, P.C.
Austin, TX

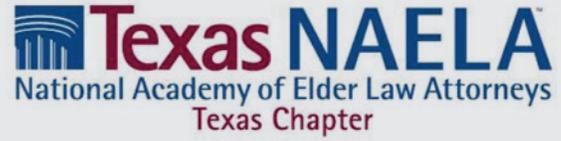
WESLEY E. WRIGHT
Wright Abshire, Attorneys
Bellaire, TX

R. HAL MOORMAN
Moorman Tate Haley Upchurch &
Yates, LLP
Brenham, TX

NATHAN D. ZIEGLER
Nathan Ziegler & Associates
Lubbock, TX

S. CLINTON NIX
Bradbury & Nix
Abilene, TX

WHY JOIN NAELA



The National Academy of Elder Law Attorneys is a nonprofit association that assists lawyers, bar organizations and others who work with older clients and their families. Established in 1987, the Academy provides a resource of information, education, networking and assistance to those who deal with the many specialized issues involved with legal services to the elderly and disabled.

The Texas Chapter of the National Academy of Elder Law Attorneys was formed in 1995. Membership is available only to attorneys who are members of the national organization (NAELA), and are licensed in the state of Texas. Texas NAELA provides continuing legal education and advocacy to promote and protect the needs of seniors and people with disabilities in Texas.

Benefits of Membership

In addition to providing an important distinction by demonstrating your dedication to elder law and special needs planning and the communities which you serve, membership in the Texas NAELA Chapter also benefits you and your practice:

- **Discussion Lists:** By subscribing to the national and local listservs, members draw on feedback from across the state and around the country.
- **Education Programming and Networking Opportunities:** Our two yearly in-person meetings provide professional education and offer the opportunity to network with elder law colleagues from across the state as well as professionals in related fields.
- **Chapter Newsletter and Website:** In addition to chapter updates, these resources bring our members the latest in elder law and special needs planning trends and court decisions, updates on state and national legislative and regulatory changes, and practice tips on current topics of interest.
- **Membership Directory:** Our Member Directory is on our website, and is searched by consumers seeking legal counsel.
- **Public Policy:** Through our public policy initiatives, your voice is heard in local, state, and national legislative and regulatory issues.
- **Join a Committee:** There are several working committees and we encourage your participation to further enjoy the networking opportunities the Texas NAELA has to offer. Committees include: By-Laws, Communications, Enforcement, Finance, Litigation, Membership, Newsletter, Peer Review, Professional Relations, and Website.

Becoming a Member

A membership application and national and chapter dues information is available on our website: www.NAELA.org/join.

Learn more at www.TexasNAELA.com.

ABOUT THE COVER



Sailboats, 11x14", Watercolor, is by J. Presley of Cumberland Trust.
For more information, visit jpresleyart.com.

ESTATE PLANNING, GUARDIANSHIP AND ELDER LAW CONFERENCE

August 3–4, 2017 ■ Moody Gardens ■ Galveston, Texas

Earn up to 14.75 Hours of Credit Including 3.25 Hours of Ethics Credit and 4.25 of Guardianship

THURSDAY MORNING, AUG. 3, 2017**Presiding Officer:****H. Clyde Farrell, Farrell & Pak PLLC,
Austin, TX****7:30 a.m. Registration Opens**

Includes continental breakfast.

8:20 a.m. Welcoming Remarks**8:30 a.m. .75 hr****She Updated Her Forms, and You Won't BELIEVE What Happens Next**

The legislature meets, a judge writes an opinion, and — OMG! We have new laws to deal with! Find out the SEVEN things you NEED to add to your forms RIGHT NOW!

Dianne Reis, Attorney at Law, Plano, TX

9:15 a.m. .75 hr**Medicaid Update**

Learn the latest developments in Medicaid law, including how "block grants" and other proposed changes may affect their practices. Estate planners who are not Medicaid specialists will acquire essential Medicaid-related forms including Qualified Income Trusts, Lady Bird Deeds, Transfer on Death Deeds, LBD/TOD Grantee Trusts and Third-Party Supplemental Needs Trusts.

H. Clyde Farrell, Farrell & Pak PLLC, Austin, TX

10:00 a.m. .50 hr**10 Pesky Probate Problems**

Hear 10 tips for new (and not so new) practitioners addressing various problems which arise during the probate process, such as dealing with collection agencies, taking control of estate property from those without authority, properly allocating rights and liabilities associated with jointly owned property, dealing with the IRS, and other "pesky" problems.

Gus G. Tamborello, Gus G. Tamborello, P.C.,
Houston, TX**10:30 a.m. Break****M
C
L
E**

This course has been approved for Minimum Continuing Legal Education credit by the State Bar of Texas Committee on MCLE in the amount of 14.75 hours, of which 3.25 credit hours will apply to legal ethics/professional responsibility credit and 4.25 hours will apply to Guardianship credit. Texas Legal Specialization Credit Approved for Estate Planning and Probate Law, and Tax Law. The University of Texas School of Law is a State Bar of California approved MCLE provider (#1944), and a MCLE presumptively-approved provider by the Supreme Court of the State of Louisiana (#0553) and the Oklahoma Bar Association (#169).

10:45 a.m. .75 hr**Probate Procedures & Alternatives**

A discussion of whom you represent, fee considerations, options and alternatives to probating a will, what to consider when there is no will, what to look for when reviewing a will, the mechanics of getting to the probate hearing, default and lost will issues, and issues in administering a simple estate. Comprehensive forms will also be provided.

Claire D. East, Hopper Mikeska, PLLC, Austin, TX
Gregory Thomas Kimmel, Allen-Lottmann-Kimmel PC,
Tyler, TX
Hon. Steve M. King, Tarrant County Probate Court
One, Fort Worth, TX

11:30 a.m. .75 hr**Drafting Wills and Trusts for Efficient Administration**

Hear a panel of corporate trustee's discuss how they administer the wills and trusts we draft, and what they would like to see in our documents. Learn what to do if a beneficiary is pushing too much.

Moderator:
Nancy Sosa, Cadence Bank, Austin, TX
Panelist:
Rita Bishop, Cadence Bank, Houston, TX
Thomas A. Horton, Bank of Texas, Houston, TX
Margaret Svoboda, American National Bank of
Texas, Rockwall, TX

12:15 p.m. Pick Up Lunch

Included in registration.

THURSDAY AFTERNOON**Presiding Officer:****Patricia F. Sitchler, The Law Office of
Patricia Flora Sitchler, La Vernia, TX****THANK YOU TO OUR
LUNCHEON SPONSOR****LUNCHEON PRESENTATION****12:35 p.m. .75 hr****Legislative Update**

Hear an update on Texas estate and trust legislation, including probate, guardianships, trusts, powers of attorney, and other related matters.

Craig Hopper, Hopper Mikeska, PLLC, Austin, TX

1:20 p.m. Break**1:35 p.m. 1.00 hr | .50 hr ethics | 1.00 hr G****The Role of the Guardian**

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.

Hon. Polly Jackson Spencer, Bexar County Probate
Court No. 1, San Antonio, TX**2:35 p.m. .50 hr****Medicaid: The View from the HHSC**

Hear the Texas Health and Human Services Commission (HHSC) address current issues in long-term care Medicaid eligibility.

Shari L. Nichols, Texas Health and Human Services
Commission, Austin, TX**3:05 p.m. .75 hr ethics****Individual Fiduciaries Gone Wild**

Executors, trustees, and other fiduciaries own the highest duties known to law and are held to strict standards of conduct. Explore the inherent risks of serving as an executor or trustee and hear suggestions for fiduciary risk management, defending breach of fiduciary duty claims, and related causes of action. Hear tips for advising clients on the appointment fiduciaries in an attempt to avoid future fiduciary litigation.

Trevor Aaron Dobbs, Roberts Markel Weinberg
Butler Hailey PC, Sugar Land, TX**3:50 p.m. Break****THANK YOU TO OUR
BREAK SPONSOR**

Keever & Wiesenthal

4:05 p.m. 1.00 hr | 1.00 hr G**Bonds, Inventories, and Accountings**

Hear a through review of the Texas Estate Code requirements for qualification of personal representatives, the inventory and accounting process (including accountings required of independent executors and agents under powers of attorney,) and numerous practical tips not found in the statutes. Comprehensive forms will also be provided.

Hon. Steve M. King, Tarrant County Probate Court
One, Fort Worth, TX

5:05 p.m. .50 hr

Hot Topics

Congress is a sizzling moving target in 2017, and the federal Department of Health and Human Services has a new Secretary, Dr. Tom Price. Discuss the winds of change, including a fundamental shift in the Medicaid funding process, potential cuts in state services, and Medicaid eligibility criteria changes. Also, hear an update on ABLE, the Special Needs Trusts Fairness Act, and the ACA Reform and its impact on Elder Law—don't miss it!

Mary Alice Jackson, Mary Alice Jackson, P.C., Austin, TX

5:35 p.m. Adjourn to Reception

THANK YOU TO OUR RECEPTION SPONSOR



RECEPTION

5:35 p.m. to 6:35 p.m.

Join us for drinks and hors d'oeuvres with program faculty and attendees.

THANK YOU TO OUR PATIO DINNER SPONSOR



PATIO DINNER — \$20 PER TICKET

7:00 p.m. to 8:30 p.m

Bring your family to the patio for food and fun in the sun!

FRIDAY MORNING, AUG. 4, 2017

Presiding Officer:

Hon. Gladys B. Burwell, Senior Statutory Probate Judge, Friendswood, TX

7:30 a.m. Conference Room Opens

Includes continental breakfast.

THANK YOU TO OUR BREAKFAST SPONSOR



Holly Carlson Zhao, Ph.D. Founder and Director

8:00 a.m. 1.00 hr | .50 hr ethics | 1.00 hr G

The Fourth Hour—Supports and Services: Underpinning the Less Restrictive Alternatives

An examination identifying the need for a guardianship and the consideration of appropriate less restrictive alternatives, as often supplemented by supports and services applicable and available to the proposed ward.

Leonard W. Woods Jr., Duggins Wren Mann & Romero, LLP, Austin, TX

Materials By:

Hon. Steve M. King, Tarrant County Probate Court One, Fort Worth, TX

9:00 a.m. 1.00 hr | .50 hr ethics | 1.00 hr G

The Role of the Ad Litem

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.

Hon. Mike Wood, Harris County Probate Court No. 2, Houston, TX

10:00 a.m. Break

10:20 a.m. .75 hr

Morals From the Courthouse: A Study of Recent Texas Cases Impacting the Wills, Probate, and Trust Practice

Discuss recent judicial developments relating to the Texas law of intestacy, wills, estate administration, trusts, and other estate planning matters.

Elisa Dillard Rainey, Rainey & Rainey, Attorneys at Law LP, Waco, TX

Materials By:

Gerry W. Beyer, Texas Tech University School of Law, Lubbock, TX

11:05 a.m. .75 hr

Deed Drafting in Estate Planning and Probate Contexts

Using the correct deed for a client is essential to prevent future problems. Distinguish the various deeds and which deed is correct in the estate planning or probate context.

Kristen Quinney Porter, Kristen Quinney Porter, LLC, New Braunfels, TX

11:50 a.m. .75 hr ethics

Ethical Considerations for Fee Applications in Probate Court

A review of the ethical considerations governing lawyers when seeking fees in Probate Court and practical aspects of fee applications.

Hon. Guy Herman, Travis County Probate Court #1, Austin, TX

12:35 p.m. Pick Up Lunch

Included in registration.

FRIDAY AFTERNOON

Presiding Officer:

Wesley E. Wright, Wright Abshire, Attorneys, Bellaire, TX

THANK YOU TO OUR LUNCHEON SPONSOR



LUNCHEON PRESENTATION

1:00 p.m. 1.00 hr | .25 hr ethics | .25 hr G

Ask the Experts

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.

Moderator:

H. Clyde Farrell, Farrell & Pak PLLC, Austin, TX

Panelists:

Craig Hopper, Hopper Mikeska, PLLC, Austin, TX
Mary Alice Jackson, Mary Alice Jackson, P.C., Austin, TX
Elisa Dillard Rainey, Rainey & Rainey, Attorneys at Law LP, Waco, TX
Dianne Reis, Attorney at Law, Plano, TX

2:00 p.m. Break

THANK YOU TO OUR BREAK SPONSOR

American National Bank of Texas

2:20 p.m. .75 hr

Dealing with Mineral Rights: A Practitioners Guide to Oil and Gas

Learn the basics of oil and gas, including mineral rights, royalties, and executive rights, while dealing with Texas issues and problems in probate, trust, elder care, and other areas.

Theodore R. Borrego, Houston, TX

3:05 p.m. .75 hr

Trust Modifications: Balancing Competing Interests

Get practical advice for trustees and beneficiaries on common issues that arise in the context of trust modifications.

Michael B. Knisely, Osborne, Helman, Knebel & Scott, LLP, Austin, TX

Jason S. Scott, Osborne, Helman, Knebel & Scott, LLP, Austin, TX

Materials By:

Glenn M. Karisch, The Karisch Law Firm, PLLC, Austin, TX

3:50 p.m. Adjourn

THANK YOU TO OUR SPEAKERS SPONSOR

Jackson B. Horn & Company, P.C.

CONFERENCE FACULTY

GERRY W. BEYER
Texas Tech University School of Law
Lubbock, TX

RITA BISHOP
Cadence Bank
Houston, TX

THEODORE R. BORREGO
Houston, TX

TREVOR AARON DOBBS
Roberts Markel Weinberg Butler
Hailey PC
Sugar Land, TX

CLAIRE D. EAST
Hopper Mikeska, PLLC
Austin, TX

H. CLYDE FARRELL
Farrell & Pak PLLC
Austin, TX

HON. GUY HERMAN
Travis County Probate Court #1
Austin, TX

CRAIG HOPPER
Hopper Mikeska, PLLC
Austin, TX

THOMAS A. HORTON
Bank of Texas
Houston, TX

MARY ALICE JACKSON
Mary Alice Jackson, P.C.
Austin, TX

GLENN M. KARISCH
The Karisch Law Firm, PLLC
Austin, TX

GREGORY THOMAS KIMMEL
Allen-Lottmann-Kimmel PC
Tyler, TX

HON. STEVE M. KING
Tarrant County Probate Court One
Fort Worth, TX

MICHAEL B. KNISELY
Osborne, Helman, Knebel & Scott, LLP
Austin, TX

SHARI L. NICHOLS
Texas Health and Human Services
Commission
Austin, TX

KRISTEN QUINNEY PORTER
Kristen Quinney Porter, LLC
New Braunfels, TX

ELISA DILLARD RAINEY
Rainey & Rainey, Attorneys at Law LP
Waco, TX

DIANNE REIS
Attorney at Law
Plano, TX

JASON S. SCOTT
Osborne, Helman, Knebel & Scott, LLP
Austin, TX

NANCY SOSA
Cadence Bank
Austin, TX

HON. POLLY JACKSON SPENCER
Bexar County Probate Court No. 1
San Antonio, TX

MARGARET SVOBODA
American National Bank of Texas
Rockwall, TX

GUS G. TAMBORELLO
Gus G. Tamborello, P.C.
Houston, TX

HON. MIKE WOOD
Harris County Probate Court No. 2
Houston, TX

LEONARD W. WOODS JR.
Duggins Wren Mann & Romero, LLP
Austin, TX

PLANNING COMMITTEE

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Hailey
Sugar Land, TX

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Austin, TX

HON. GUY HERMAN
Travis County Probate Court #1
Austin, TX

CRAIG HOPPER
Hopper Mikeska, PLLC
Austin, TX

MARY ALICE JACKSON
Mary Alice Jackson, P.C.
Austin, TX

JOANNA JEFFERSON
The University of Texas School of Law
Austin, TX

GLENN M. KARISCH
The Karisch Law Firm, PLLC
Austin, TX

CHRISTINA LESHAR
The Law Office of Christina Leshar, PC
Houston, TX

RENÉE C. LOVELACE
The Lovelace Law Firm, P.C.
Austin, TX

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

MARILYN G. MILLER
Marilyn G Miller, Attorney at Law
Dripping Springs, TX

BLISS BURDETT PAK
Farrell & Pak PLLC
Austin, TX

BRYN A. POLAND
Law Office of Pi-Yi Mayo
Baytown, TX

PATRICIA F. SITCHLER
The Law Office of Patricia Flora
Sitchler
La Vernia, TX

NANCY SOSA
Cadence Bank
Austin, TX

WESLEY E. WRIGHT
Wright Abshire, Attorneys
Bellaire, TX

REASONS TO ATTEND

The **Estate Planning, Guardianship and Elder Law Conference** presents current developments and practical tips for estate planners and elder law attorneys, offers essential information for guardians ad litem, and provides a must-have set of materials and resources. Objectives:

- Get practical guidance on updating key forms to reflect changes to the law
- Hear the latest developments in Medicaid law and walk through essential forms for Medicaid specialists and non-specialists
- Hear a panel of corporate trustees discuss how they administer the wills and trusts you draft and with tips for Drafting Wills and Trusts for Efficient Administration
- Discuss “pesky” probate issues, including working with creditors and claims, as well as options and alternatives to probating a will
- Explore key guardianship issues and alternatives—for up to 4.25 hours of Guardianship credit—including The Role of the Guardian, The Role of the Ad Litem, The Fourth Hour—Supports and Services: Underpinning the Less Restrictive Alternatives, and a review of the Texas Estate Code requirements for qualification of personal representative
- Hear the latest case law, legislative and agency updates, including a presentation by the Health and Human Services Commission (HHSC)
- Get answers to your questions at the popular Ask the Experts panel
- Earn up to 3.25 hours of legal ethics credit
- Join conference faculty and fellow colleagues at the Thursday Evening Networking Reception and then join us at the pool for an evening cookout

ACCREDITATION

CPE CREDIT

The University of Texas School of Law is registered with the National Association of State Boards of Accountancy (NASBA) as a sponsor of continuing professional education on the National Registry of CPE Sponsors. State boards of accountancy have final authority on the acceptance of individual courses for CPE credit. Complaints regarding registered sponsors may be submitted to the National Registry of CPE Sponsors through its website: www.learningmarket.org.

Earn up to 17.50 credits in Specialized Knowledge and Applications.

Delivery Method: Group-Live
Program Level: Overview
Advance Preparation: None

To comply with NASBA Standards, the Registry sponsor is required to maintain records of participation, dates and locations of programs, and number of CPE credits earned by participants. Attendance sign-in sheets will be available at the registration desk, and attendees claiming CPE credit must sign in to verify attendance for each segment. You will need your CPA license number to sign in. A CPE Certificate of Completion will be issued at the conclusion of the conference.

CFP CREDIT

21.00 hours of Certified Financial Planner credit (CFP) expected.

REGISTRATION FORM

ERT17/ER17

Register:
www.utcle.org/conferences/ERT17
www.utcle.org/conferences/ER17

Mail:
The University of Texas School of Law
Attn. Registration
PO Box 7759
Austin, TX 78713-7759

Fax:
512.475.6876

Questions?
512.475.6700

*Dietary requirements or Accessibility needs?
Call 512.475.6700 or email service@utcle.org*

PLEASE PRINT CLEARLY

Bar Card# _____ TX Other State: _____ N/A

Name [Mr. / Ms.] _____

Firm _____

Address _____

City _____ State _____ Zip _____

Telephone _____ Fax _____

Registrant's Email (required) _____ Assistant's Email (optional) _____

Invoices, confirmations, and receipts are emailed to these addresses.

REGISTRATION—Select items from ONE of the columns below

**Texas NAELA members who attend
UT Law's Estate Planning and
Elder Law Conference may
attend the TX NAELA Summer
Conference at no charge!**

(use far right column)

WEDNESDAY ONLY

TX NAELA SUMMER CONFERENCE ONLY
(Open to TX NAELA Members ONLY)

Includes Wednesday Luncheon and Dinner

- Individual registration by Wed. July 26 \$195
- Individual registration after Wed. July 26 \$220

Wednesday Evening Dinner

- Registrant RSVP
- Add Non-Registrant Guest \$75

Printed course materials available through July 26 - please select.
Conference registration includes Electronic Materials

- Printed Course Binder (no charge)

Registration Subtotal \$ _____

THURSDAY AND FRIDAY ONLY

**UT LAW'S ESTATE PLANNING, GUARDIANSHIP
AND ELDER LAW CONFERENCE**

*Includes Thursday Lunch Presentation,
Evening Reception, and Friday Lunch Presentation*

- Individual registration by Wed. July 26 \$575
- Individual registration after Wed. July 26 \$625

Optional – Thursday Evening Patio Dinner (\$20 per ticket)

- # of tickets _____
- Patio Dinner Subtotal \$ _____

Printed course binder available for an additional fee through July 26

Conference registration includes Electronic Course Binder Download (PDF) in "Your Briefcase" at utcle.org.

- Printed Course Binder \$37.89
- Printed Course Binder for tax-exempt registrants . \$35

Registration Subtotal \$ _____

ALL THREE DAYS!

**UT LAW ESTATE PLANNING, GUARDIANSHIP
AND ELDER LAW CONFERENCE**

**AND
TX NAELA SUMMER CONFERENCE**

(Open to TX NAELA Members ONLY)

*Includes Wednesday Luncheon and Dinner,
Thursday Lunch Presentation and Evening Reception,
and Friday Lunch Presentation*

- Individual registration by Wed. July 26 \$575
- Individual registration after Wed. July 26 \$625

Wednesday Evening Dinner

- Registrant RSVP
- Add Non-Registrant Guest \$75

Optional – Thursday Evening Patio Dinner (\$20 per ticket)

- # of tickets _____
- Patio Dinner Subtotal \$ _____

Printed course binder available for an additional fee through July 26

Conference registration includes Electronic Course Binder Download (PDF) in "Your Briefcase" at utcle.org.

- Printed Course Binder \$37.89
- Printed Course Binder for tax-exempt registrants . \$35

Registration Subtotal \$ _____



Want to join NAELA?

Visit www.TexasNAELA.com

Can't make the live conference? Consider post conference options

Estate Planning, Guardianship and Elder Law Conference ONLY

ECONFERENCE—For Texas MCLE Credit

Complete eConference package includes all conference materials for download from "Your Briefcase" at utcle.org. Available 6–8 weeks after the live conference date.

- Individual eConference \$525
Call 512.475.6700 to register additional participants.

COMPLETE CONFERENCE MATERIALS[†]—For Research and Self-Study

Comprehensive Binder and Audio from the live conference. Available for download 4–6 weeks after the live conference date. Texas customers add 8.25% sales tax.

- eBinder Download (PDF) \$225
- Printed Binder \$275
- Audio Download (MP3) \$175

[†]Texas customers—add 8.25% sales tax or include an Exemption Certificate \$ _____
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PAYMENT INFORMATION

METHOD OF PAYMENT

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GALVESTON

August 2, 3–4, 2017

CONFERENCE LOCATION



Moody Gardens Hotel
 Seven Hope Boulevard
 Galveston, Texas
 888.388.8484

Special Room Rate: \$199
 good through July 10
 (subject to availability)

Parking:
 Complimentary self-parking

KEY DATES

July 26, 2017

last day for early registration
 add \$50 for registrations
 received after this time

July 28, 2017

last day for cancellation (full refund)

July 31, 2017

last day for cancellation (partial refund)
 \$50 processing fee applied

August 2, 2017, 2:00 p.m.

TX NAELA Summer Conference Begins
 *Open to Members ONLY

August 3, 2017, 8:20 a.m.

UT Elder Law Conference Begins

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