

# 2017 Texas NAELA Summer Conference

## August 2, 2017 • Moody Gardens • Galveston, TX

### Wednesday Afternoon, Aug. 2, 2017

**Presiding Officer:**

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

11:00 am	<b>Registration Opens</b>
12:00 pm	<p><b>Meet the Board: New Members' Lunch</b></p> <p>New to TX NAELA? Meet current members at this informal luncheon mixer.</p> <p><b>Thank You to Our Lunch Sponsor</b> Wunderlich Securities, Inc.</p>
1:00 pm	<b>Board Meeting</b>
2:00 pm 0.75 hr	<p><b>Unauthorized Practice of Law: How Clients are Being Harmed</b></p> <p>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.</p> <p><i>This session was originally scheduled on Wednesday, August 2nd at 4:30 p.m.</i></p> <p>Mary Alice Jackson, Mary Alice Jackson, P.C. - Austin, TX Howard S. Krooks, Elder Law Associates PA - Boca Raton, FL Marian S. Rosen, Rosen &amp; Spears - Houston, TX Nathan D. Ziegler, Nathan Ziegler &amp; Associates - Lubbock, TX</p>
2:45 pm 0.75 hr	<p><b>Family Fusion: Estate Planning Beyond the Nuclear Unit</b></p> <p>Discuss the approaches an estate planning attorney might employ when working with a blended family, and the various planning techniques that may be utilized.</p> <p>Kristi N. Elsom, Fizer Beck - Houston, TX Materials By: Jovana Popovich, Fizer Beck - Houston, TX</p>
3:30 pm	<b>Break</b>
3:45 pm 0.75 hr	<p><b>Preventing and Recovering from Elder Financial Fraud</b></p> <p>A detailed analysis of the types of predators and the methods they use to victimize isolated individuals including elderly and intellectually disabled individuals.</p> <p>Hon. Claudia Lee Laird, Montgomery County Court at Law #2 - Conroe, TX Darlene Payne Smith, Crain Caton &amp; James - Houston, TX</p>

4:30 pm  
0.75 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.

*This session was originally scheduled on Wednesday, August 2nd at 2:00 p.m.*

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

## **Wednesday Evening, Aug. 2, 2017**

### **Presiding Officer:**

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

5:15 pm

### **Break**

Join your colleagues for drinks before the Annual Meeting begins.

5:30 pm

### **Annual Meeting and Election of Officers**

### **Wednesday Evening Dinner (included in registration)**

### **Wednesday Evening Dinner — Add Non-Registrant Guest**

6:00 pm

### **Texas NAELA Dinner**

### **Thank You to Our Dinner Sponsor**

Cadence Bank

6:15 pm  
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 pm

### **Break**

7:30 pm  
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 pm

**Adjourn**