

26TH ANNUAL
**ESTATE PLANNING, GUARDIANSHIP
AND ELDER LAW CONFERENCE**

August 8–9, 2024
La Cantera Resort & Spa ■ San Antonio, Texas

 **Live Webcast August 8–9**

Earn up to 14.75 Hours of Credit Including 3.25 Hours of Ethics and 4.25 of Guardianship (Hours Vary by State)

MCLE Credit Approved in TX, CA, OK, and PA

TX Legal Specialization Credit Approved for Estate Planning and Probate Law, and Tax Law

Earn up to 17.50 Hours of Texas Certified Professional Accounting Credit and National Accounting CPE Credit (in-person only)

Additional Credit Approved for Certified Financial Planner (CFP) Professional Accreditation and ICB Certified Trust and Financial Advisor (CTFA)
Credit Expected for TX Guardianship Certification Board (GCB)



TX NAELA MEMBERS – COME A DAY EARLY!

TEXAS NAELA SUMMER CONFERENCE

Open to TX NAELA Members ONLY

August 7, 2024
La Cantera Resort & Spa ■ San Antonio, Texas

Earn Up To 5.50 Hours of Credit Including 1.00 Hour of Ethics Credit MCLE Credit Approved in TX and CA

Earn up to 6.50 Hours of Texas Certified Professional Accounting Credit

2024

TEXAS NAELA SUMMER CONFERENCE

Open to TX NAELA Members ONLY

August 7, 2024 ■ La Cantera Resort & Spa ■ San Antonio, Texas

Earn up to 5.50 Hours of Credit Including 1.00 Hour of Ethics Credit

WEDNESDAY MORNING, AUG. 7, 2024

INTERESTED IN A PROFESSIONAL HEADSHOT?

Refresh your online presence with a FREE PROFESSIONAL HEADSHOT for the first 75 Texas NAELA members Summer Conference attendees who sign up. Email Lynnelle@lokemoorelaw.com with your preference of a morning or afternoon time. Special thanks to our sponsors McKnight Title and Tim Allums, Realtor KW Heritage.

10:30 a.m. Registration and Exhibit Hall Opens

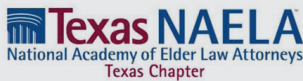
11:00 a.m. Board Meeting
All TX NAELA members are welcome to join.

11:45 a.m. Pick Up Lunch
Included in registration.

THANK YOU TO OUR LUNCHEON SPONSOR



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.

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.

WEDNESDAY AFTERNOON

GENERAL SESSIONS (Main Ballroom)

Presiding Officer:
Joy Eckelkamp, Rapp and Krock, PC,
Houston, TX

12:00 p.m. Welcoming Remarks

12:15 p.m. .75 hr | .25 hr ethics

My Step-Kids Own My Home: And Other Ways We Need to Plan Better in Blended Families

Explore how to address blended families in estate planning, Medicaid, VA, and probate contexts, including best practices and how to speak with your clients about the challenges non-traditional families bring.

Jennifer L. Coulter, Townsend Allala, Coulter & Kludt, PLLC, El Paso, TX
Erin W. Peirce, Leu, Peirce, & Olson, PLLC, Plano, TX

1:00 p.m. .25 hr ethics

Lurking in the Shadows: The Growing Threat of the Unauthorized Practice of Law in Estate Planning and Long-Term Care Medicaid Planning

Update on the evolving landscape of the unauthorized practice of law (UPL) in estate planning and long-term care Medicaid planning. Discuss the manner in which individuals and entities engage in these unauthorized activities, how it endangers those who are targeted by and use the services of these unauthorized individuals/entities, and why lawyers should be concerned.

Ben King, Ross & Shoalmire, L.L.P., Texarkana, TX

1:15 p.m. .75 hr

Using Artificial Intelligence in Your Elder Law Practice: Can ChatGPT Get My Clients on Medicaid?

Explore what artificial intelligence is, and what it should and should not be used for in your practice. Discuss several current applications of artificial intelligence that are designed for law firms.

Michael Delaney, DDV Law, Ltd., Orland Park, IL

2:00 p.m. 15-Minute Break to Visit Exhibitors

THANK YOU TO OUR BREAK SPONSOR



2:15 p.m. 1.50 hrs | .25 hr ethics

What You Don't Know Can Hurt You: Oil Gas, Wind, and Water

A participatory, interactive presentation covering what you have to anticipate in the area of oil and gas law as you represent families and individuals.

Moderator:

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

Panelists:

Lisa Shoalmire, Ross & Shoalmire PLLC, Texarkana, TX
O. Henry (Mike) Young, Law Offices of O. Henry (Mike) Young, PC, Abilene, TX

3:45 p.m. 15-Minute Break to Visit Exhibitors

4:00 p.m. .50 hr

Medicaid Strategies for Handling Homesteads Exceeding the Maximum Equity Value

With property values trending upward, the annual adjustment for property values may not be enough allow property to stay below the maximum equity value for Medicaid eligibility. Get – or share – some ideas on how to handle this issue.

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

4:30 p.m. .75 hr

When Grandpa Gets a Girlfriend: What To Do When You Suspect a Romance Scam

Sweetheart swindlers use manipulation and fraud to deceive elders into giving them money, often leaving elders financially ruined and emotionally devastated. Learn the warning signs of a romance scam, how to approach the victim with your concerns, what law enforcement requires to bring criminal charges, and what you can do to protect the elder's assets.

Lisa V. Patterson, Dallas County District Attorney's Office – Elder Abuse Unit, Dallas, TX

5:15 p.m. Break (Pick Up Drinks)

MEDICAID PLANNING WORKSHOP
(San Jose Room)

Attendees must RSVP and pay an additional fee of \$75 for the Medicaid Planning Workshop when registering for the conference. Attendance is limited to the first 24 people.

Presiding Officer:

Cathy Kim Fowlkes, Fowlkes Law Firm, PC, Abilene, TX

12:00 p.m. Welcoming Remarks

12:15 p.m. 1.75 hrs | .25 hr ethics

Medicaid Planning Nuts and Bolts - A Case Study

A comprehensive Workshop, in three parts, intended for those who are new to Medicaid planning and are having trouble getting started and putting the pieces together. A hands-on, interactive case study from the initial client call to the gathering and interpretation of information, the Medicaid application, correspondence with HHS, and the possible appeal.

- Kelley M. Bentley, The Bentley Law Firm, Sugar Land, TX
- Julie Ann Ezell-Perez, Ezell & Ezell, PLLC, Harlingen, TX
- Benecia Flores, Petrosewicz Law Firm, P.C., Richmond, TX
- Cathy Kim Fowlkes, Fowlkes Law Firm, PC, Abilene, TX
- Lori A. Leu, Leu, Peirce, & Olson, PLLC, Plano, TX
- Lynnelle Loke Moore, Loke Moore Law, PLLC, San Antonio, TX
- Lauren Olson, Leu, Peirce, & Olson, PLLC, Plano, TX

2:00 p.m. 15-Minute Break to Visit Exhibitors

2:15 p.m. 1.50 hrs | .25 hr ethics

Medicaid Planning Nuts and Bolts - A Case Study Resumes

Continuation of the comprehensive Workshop, in three parts, intended for those who are new to Medicaid planning and are having trouble getting started and putting the pieces together. A hands-on, interactive case study from the initial client call to the gathering and interpretation of information, the Medicaid application, correspondence with HHS, and the possible appeal.

- Kelley M. Bentley, The Bentley Law Firm, Sugar Land, TX
- Julie Ann Ezell-Perez, Ezell & Ezell, PLLC, Harlingen, TX
- Benecia Flores, Petrosewicz Law Firm, P.C., Richmond, TX
- Cathy Kim Fowlkes, Fowlkes Law Firm, PC, Abilene, TX
- Lori A. Leu, Leu, Peirce, & Olson, PLLC, Plano, TX
- Lynnelle Loke Moore, Loke Moore Law, PLLC, San Antonio, TX
- Lauren Olson, Leu, Peirce, & Olson, PLLC, Plano, TX

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- Cathy Kim Fowlkes, Fowlkes Law Firm, PC, Abilene, TX
- Lori A. Leu, Leu, Peirce, & Olson, PLLC, Plano, TX
- Lynnelle Loke Moore, Loke Moore Law, PLLC, San Antonio, TX
- Lauren Olson, Leu, Peirce, & Olson, PLLC, Plano, TX

5:15 p.m. Break (Rejoin Group and Pick Up Drinks)

WEDNESDAY EVENING

Presiding Officer:

Joy Eckelkamp, Rapp and Krock, PC, Houston, TX

5:30 p.m. 1.00 hr | .25 hr ethics

Happy Hour - Elder Law Trivia

Grab a glass of wine or your favorite beverage, find a seat, and engage with your table-mates in a friendly game of Elder Law Trivia. A prize awaits the winning table.

Moderator:

Angela Odensky, The Law Office of Angela Odensky, PLLC, Bellaire, TX

Panelists:

Marilyn G. Miller, Marilyn G. Miller, Attorney at Law, Dripping Springs, TX
Ruth-Ann Toups, The Toups Law Firm, Spring, TX

TEXAS NAELA DINNER, Annual Meeting, Election of Officers, and Member Recognition

6:30 p.m.

Included for registrants;
\$90 for non-registrant guests

THANK YOU TO OUR DINNER SPONSOR



8:00 p.m. Adjourn

TEXAS NAELA SUMMER CONFERENCE FACULTY & PLANNING COMMITTEE

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Abilene, TX

LISA SHOALMIRE* —CO-CHAIR
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Texarkana, TX

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Law Office of Michael Baumer
Austin, TX

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The Bentley Law Firm
Sugar Land, TX

JENNIFER L. COULTER*
Townsend Allala, Coulter & Kludt, PLLC
El Paso, TX

CICI C. CUNNINGHAM*
Attorney at Law
Humble, TX

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DDV Law, Ltd.
Orland Park, IL

JOY ECKELKAMP*
Rapp and Krock, PC
Houston, TX

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Theander & Grimes, PLLC
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Ezell & Ezell, PLLC
Harlingen, TX

BENECIA FLORES*
Petrosewicz Law Firm, P.C.
Richmond, TX

MELANIE IBARRA-HERRERA*
The Garrett Law Firm, PLLC
Austin, TX

BEN KING
Ross & Shoalmire, L.L.P.
Texarkana, TX

LORI A. LEU
Leu, Peirce, & Olson, PLLC
Plano, TX

LYNNELLE LOKE MOORE*
Loke Moore Law, PLLC
San Antonio, TX

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

ANGELA ODENSKY*
The Law Office of Angela Odensky, PLLC
Bellaire, TX

LAUREN OLSON
Leu, Peirce, & Olson, PLLC
Plano, TX

ALICIA V. PATTERSON
Dallas County District Attorney's Office – Elder Abuse Unit
Dallas, TX

ERIN W. PEIRCE
Leu, Peirce, & Olson, PLLC
Plano, TX

TERESA SHAHAN SHAPIRO*
Teresa Shapiro Law
Leander, TX

RUTH-ANN TOUPS*
The Toups Law Firm
Spring, TX

WESLEY E. WRIGHT
Wright Abshire, Attorneys P.C.
Bellaire, TX

O. HENRY (MIKE) YOUNG
Law Offices of O. Henry (Mike) Young, PC
Abilene, TX

*Planning Committee member

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Credit Expected for TX Guardianship Certification Board (GCB)

Times listed are Central Standard

THURSDAY MORNING, AUG. 8, 2024**Presiding Officer:**

**Wesley E. Wright, Wright Abshire,
Attorneys P.C., Bellaire, TX**

**7:30 a.m. Registration and
Exhibit Hall Opens**

Includes continental breakfast.

**THANK YOU TO OUR
BREAKFAST SPONSOR**



8:20 a.m. Welcoming Remarks

8:30 a.m. Case Law Update .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, Attorneys at Law LP, Waco, TX

9:00 a.m. A House Divided: The Rights and Duties of Homesteaders, Life Tenants, Remaindermen, and Co-Tenants .50 hr

A House Divided: The Rights and Duties of Homesteaders, Life Tenants, Remaindermen, and Co-Tenants

Discuss the often complex relationship between the surviving spouse who chooses to exercise her homestead right, or who inherits a life estate in separate property, and the remaindermen who are standing by to receive the property. Learn the various rights and obligations of those who exercise a homestead right, possess a life estate, or own a remainder interest in property.

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

**THANK YOU TO OUR
WEBCAST SPONSOR**



9:30 a.m. Medicaid Update and Other Hot Topics .75 hr

Medicaid Update and Other Hot Topics

This presentation identifies and explains 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 really well.

H. Clyde Farrell, Farrell & Johnson PLLC, Austin, TX
Marilyn G. Miller, Marilyn G. Miller, Attorney at Law, Dripping Springs, TX

10:15 a.m. 15-Minute Break

10:30 a.m. Partition of Real Property Under Texas Law: A Primer .50 hr

Partition of Real Property Under Texas Law: A Primer

An overview of the litigation process of a claim for partition of real estate, including issues which arise under the Uniform Partition of Heirs’ Property Act.

Sanford L. Dow, Dow Golub Remels & Gilbreath, PLLC, Houston, TX

11:00 a.m. Planning for Clients Who Might Have a Taxable Estate .75 hr

Planning for Clients Who Might Have a Taxable Estate

As advisors, if we knew when clients would pass away, who would survive them, the assets included in their taxable estates, and what the tax laws would be at the time of their deaths, we could all design perfect estate plans. Of course we are forced to do the best we can with what we have, including a scheduled 50% reduction to the transfer tax exemption amounts in 2026. This presentation focuses on estate planning and gifting strategies for clients who may or may not have a taxable estate, offering practical examples designed to empower advisors to enhance client relationships.

Jeff Chadwick, Winstead PC, The Woodlands, TX

11:45 a.m. 30-Minute Break for Lunch and Visit Exhibitors

Lunch included in registration.

GUEST MEAL PASSES—\$75

Have family members or guests joining you in San Antonio?

You can now purchase a guest meal pass for each of your guests, that includes Thursday and Friday’s continental breakfasts and lunches.

THURSDAY AFTERNOON**Presiding Officer:**

**Bryn A. Poland, Mayo & Poland PLLC,
Baytown, TX**

**THANK YOU TO OUR
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**LUNCHEON PRESENTATION**

12:15 p.m. Business Entities in Estate Planning: Asset Protection, Anonymity, and the Corporate Transparency Act .50 hr

Business Entities in Estate Planning: Asset Protection, Anonymity, and the Corporate Transparency Act

An overview of the leading issues related to asset protection and anonymity in business entity structures. Focus on the primary areas of concern when choosing the type of entity, jurisdiction for formation and ownership structure when the goals are asset protection and anonymity and the impact of the Corporate Transparency Act on these choices.

John K. Ross IV, Ross & Shoalmire PLLC, Texarkana, TX

12:45 p.m. 15-Minute Break

1:00 p.m. 1.00 hr | .50 hr ethics | 1.00 hr G

Alternatives to Guardianship including Supports and Services

A discussion of practical considerations in determining whether lesser restrictive alternatives and supports and services are available and feasible in guardianship proceedings.

Hon. Jason Cox, Harris County Probate Court 3, Houston, TX

2:00 p.m. Medicaid Planning or Medicaid Avoidance? .75 hr | .25 hr ethics

Medicaid Planning or Medicaid Avoidance?

Sometimes we can help a relatively wealthy person qualify for Medicaid long-term care. This presentation explores how to help the client determine whether or not they are able to pay privately; and if so, whether they would be better served by doing so or by qualifying for Medicaid.

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

2:45 p.m. 10-Minute Break

THANK YOU TO OUR
BREAK SPONSOR



2:55 p.m. .50 hr

MERP Defense

This presentation provides updates on changes in defending against MERP claims and discussion of continuing sticky situations and traps. Discuss where HMS and we disagree and the problems of timelines, statutes of limitations, and the need for legislative change.

Jennifer L. Coulter, Townsend Allala, Coulter & Kludt, PLLC, El Paso, TX

3:25 p.m. .50 hr | .25 hr ethics | .25 hr G

When All Else Fails...Avoiding the Dreaded Certified Mail Return Receipt Requested! What Exactly Does a Qualified Delivery Method Mean for Probate and Guardianship?

Certified mail has become increasingly unreliable. Discuss recent changes to the Estates Code regarding alternative service options in probate and guardianship cases.

Joy Eckelkamp, Rapp and Krock, PC, Houston, TX

3:55 p.m. .50 hr

Execution of Documents

It is said that more documents fail due to improper execution rather than improper drafting. Proper effective execution rules are not difficult, but they can be draconian. Mistakes can be fatal (to the document), especially when one person is signing in a capacity for another.

Richard Melamed, Richard Melamed, PLLC, Houston, TX

4:25 p.m. .75 hr | .25 hr ethics

Can We Talk? Pt. I

A moderated discussion of the day's topics with various presenters and the audience. Please submit your questions in advance to ConferenceQA@utcle.org.

Moderator:

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

Panelists:

Jeff Chadwick, Winstead PC, The Woodlands, TX
Jennifer L. Coulter, Townsend Allala, Coulter & Kludt, PLLC, El Paso, TX
Sanford L. Dow, Dow Golub Remels & Gilbreath, PLLC, Houston, TX
Marilyn G. Miller, Marilyn G. Miller, Attorney at Law, Dripping Springs, TX
John K. Ross IV, Ross & Shoalmire PLLC, Texarkana, TX

5:10 p.m. **Adjourn to Reception**

NETWORKING RECEPTION

5:10 p.m. – 6:10 p.m.

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

FRIDAY MORNING, AUG. 9, 2024

Presiding Officer:

Benecia Flores, Petrosewicz Law Firm, P.C., Richmond, TX

7:30 a.m. **Conference Room and Exhibit Hall Opens**

Includes continental breakfast.

8:00 a.m. .50 hr | .25 hr ethics | .50 hr G

The Rules of Evidence in Guardianship Proceedings

This presentation is designed to be a practical guide to the Texas Rules of Evidence that are most applicable in Guardianship Proceedings.

Paul Albert Romano, Romano & Sumner, PLLC, Sugar Land, TX

8:30 a.m. .75 hr | .25 hr ethics | .75 hr G

Settlements of Guardianship Disputes

Discussion of practical and technical considerations when settling guardianship disputes and related litigation, including necessary parties, potential settlement structure to avoid a guardianship, authority and limitations on a proposed guardian, and options to bind the proposed ward and proposed ward's estate. The discussion also includes ways to enforce guardianship settlement agreements.

Sarah Patel Pacheco, Jackson Walker LLP, Houston, TX

9:15 a.m. .75 hr

Characterization of Marital Property

Learn about the various estates in a Texas marriage (i.e. separate estate and community estate), tracing and characterization of assets, and calculation of reimbursement claims. Hear about the intersection of probate and characterization and discuss the impact of various estate planning transactions and mechanisms on the characterization of assets.

Haran Levy, BDO USA, P.C., Houston, TX

10:00 a.m. **15-Minute Break**

10:15 a.m. .50 hr

Proper Preparation of Form 706

Practical advice for preparing and filing the United States Estate (and Generation-Skipping Transfer) Tax Return, including considerations and tips when filing for portability purposes.

Katherine J. Dickinson, Locke Lord LLP, Houston, TX

10:45 a.m. .75 hr

Trust Protectors

Using trust protectors to make changes to trusts, including advantages, disadvantages and potential liability.

Glenn M. Karisch, Karisch Jonas Law, PLLC, Austin, TX

11:30 a.m. **30-Minute Break for Lunch and Visit Exhibitors**

Lunch included in registration.

FRIDAY AFTERNOON

Presiding Officer:

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

THANK YOU TO OUR
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LUNCHEON PRESENTATION

12:00 p.m. 1.00 hr ethics

Ethics Jeopardy

Ethics Jeopardy is a game show themed presentation in which audience members can compete against each other using the Kahoot app, or by logging on to www.Kahoot.it. Trophies will be awarded to 1st, 2nd, and 3rd place contestants.

Hon. Jerry Simoneaux, Harris County Probate Court 1, Houston, TX

1:00 p.m. **30-Minute Break and Vendor Announcements**

1:30 p.m. .50 hr

Estate Planning Best Practices

Practical advice on how to avoid contests and other litigation related to estate planning drafting.

Jessica Newill, Gardener Law Firm, San Antonio, TX

2:00 p.m. .50 hr | .25 hr ethics | .50 hr G

Fee Petitions in Guardianship Cases

This presentation explores the results of a statewide survey from courts handling probate and guardianship cases. The survey aims to collect information on fee standards, fee petition preferences, local rules, and other relevant questions regarding fee assessments and payments.

John B. Henry III, Law Office of John B. Henry, III, PLLC, Bellaire, TX

2:30 p.m. .50 hr | .25 hr ethics | .50 hr G

Medicaid Planning in Guardianships

A discussion of how government benefits planning for single and married individuals can be accomplished in the context of Guardianships and Community Administrations.

Theresa A. Clarke, Wright Abshire, Attorneys, Bellaire, TX

3:00 p.m. **10-Minute Break**

3:10 p.m. .75 hr | .75 hr G

Mental Commitments vs. Guardianships

Discuss finding the correct path to protection.

Hon. Guy Herman, Travis County Probate Court #1, Austin, TX
Darlene Smith, Crain, Caton & James, P.C., Houston, TX

3:55 p.m. .75 hr | .25 hr ethics

Let's Keep Talking! Pt. II

A moderated discussion of the day's topics with various presenters and the audience. Please submit your questions in advance to ConferenceQA@utcle.org.

Moderator:

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

Panelists:

Theresa A. Clarke, Wright Abshire, Attorneys, Bellaire, TX

John B. Henry III, Law Office of John B. Henry, III, PLLC, Bellaire, TX

Glenn M. Karisch, Karisch Jonas Law, PLLC, Austin, TX
Jessica Newill, Gardener Law Firm, San Antonio, TX
Sarah Patel Pacheco, Jackson Walker LLP, Houston, TX
Paul Albert Romano, Romano & Sumner, PLLC, Sugar Land, TX

4:40 p.m. Adjourn

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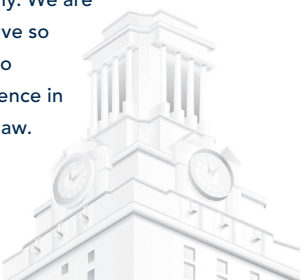
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In addition, we continue to offer multiple educational opportunities online—both live and on-demand—by bringing practitioners together virtually. We are fortunate to serve so many of you who strive for excellence in the practice of law.



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The Bentley Law Firm
Sugar Land, TX

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Travis County Probate Court #1
Austin, TX

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Rainey & Rainey, Attorneys at Law
LP
Waco, TX

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Winstead PC
The Woodlands, TX

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Townsend Allala, Coulter & Kludt,
PLLC
El Paso, TX

LORI A. LEU*
Leu, Peirce, & Olson, PLLC
Plano, TX

HON. JERRY SIMONEAUX
Harris County Probate Court 1
Houston, TX

HON. JASON COX
Harris County Probate Court 3
Houston, TX

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Farrell & Johnson PLLC
Austin, TX

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

REGISTRATION FORM

Register:
www.utcle.org/conferences/ERT24
www.utcle.org/conferences/ER24

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

Fax:
512.475.6876

Questions?
512.475.6700

If you would like to request accommodations under the ADA, please contact Customer Service at 512.475.6700 or service@utcle.org at least 10 days prior to the conference.

PLEASE PRINT CLEARLY

ERT24/ER24

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

WEDNESDAY

**TX NAELA SUMMER CONFERENCE
(OPEN TO TX NAELA MEMBERS ONLY)**

Includes Electronic Course Binder Download (PDF) in "Your Briefcase".

- Live, In-Person Registration. . . \$295 | \$345 after July 24
- Medicaid Session (space is limited) \$75
- Wednesday Lunch RSVP
- Wednesday Evening Dinner RSVP
- Wednesday Evening Guest Dinner Ticket. . . . \$90 x _____

Printed and Shipped Binder with Registration (Shipping Included) – Available for order through August 6, 2024
Please note that the printed binder will arrive 2-3 weeks after the event. Delivery to P.O. boxes is not permitted.

- Printed and Shipped Binder with Registration (Shipping Included). \$81.19 (\$75*)

Wednesday Registration Subtotal \$ _____

THURSDAY AND FRIDAY

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

Includes Electronic Course Binder Download (PDF) in "Your Briefcase".

- Live, In-Person Registration. \$725 | \$825 after July 24
- Live Webcast Registration. \$725 | \$825 after July 24
- Thurs–Fri Guest Meal Pass (limit 5). \$75x _____

Printed and Shipped Binder with Registration (Shipping Included) – Available for order through August 6, 2024
Please note that the printed binder will arrive 2-3 weeks after the event. Delivery to P.O. boxes is not permitted.

- Printed and Shipped Binder with Registration (Shipping Included) \$81.19 (\$75*)

Webcast Add-on

Register for the in-person conference and add on the webcast format for attendance flexibility.

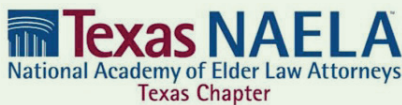
- Webcast Add-on \$75

Thursday and Friday Registration Subtotal \$ _____

REGISTRATION SUBTOTAL FOR ALL THREE DAYS \$ _____

TX NAELA MEMBERS — SAVE \$245 WITH REGISTRATION FOR BOTH CONFERENCES

-\$245 \$ _____



**Want to join NAELA?
Visit www.TexasNAELA.com**

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

UT Law Estate Planning, Guardianship and Elder Law Conference ONLY

eConference – For Texas MCLE Credit

Includes Electronic Course Binder Download (PDF) and program video/audio. Available 6–8 weeks after live event. Hours may vary depending on actual event runtime.

- Individual eConference \$825

Post-Course Binder – For Research and Self-Study

Comprehensive binder with papers and slides, available for delivery 6–8 weeks after live event.

- Electronic Post-Course Download (PDF) \$297.69 (\$275*)
** Tax-exempt rate for, e.g., government employees and nonprofits. Include a Tax-Exempt Certificate with order.*

- Printed Post-Course Binder \$351.81 (\$325*)
** Tax-exempt rate for, e.g., government employees and nonprofits. Include a Tax-Exempt Certificate with order.*

Estate Planning, Guardianship and Elder Law Materials SUBTOTAL \$ _____

PAYMENT INFORMATION

METHOD OF PAYMENT

- Check (make check payable to The University of Texas at Austin) VISA MasterCard American Express P.O.

Card/P.O. # _____ CVV # _____ Exp. Date (mm/yy) _____ / _____

Authorized Signature _____

ORDER GRAND TOTAL \$ _____

* Tax-exempt rate for, e.g., government employees and nonprofits. Include a Texas Sales and Use Tax Exemption Certificate with order.

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SAN ANTONIO

August 7, 8–9, 2024

CONFERENCE LOCATION



La Cantera Resort & Spa

16641 La Cantera Parkway
San Antonio, TX 78256
210.558.6500
855.499.2960 (reservations)

Special Room Rate: \$217

Discounted Resort Fee: \$30

good through July 8, 2024
reference group code UTG3124A
(subject to availability)

Parking:

Please visit www.utcle.org/conferences/ER24
for daily and overnight rates

KEY DATES

July 24, 2024

Last day for early registration rates

August 2, 2024

Last day for full refund cancellation

August 5, 2024

Last day for partial refund cancellation
\$50 processing fee applied

August 7, 2024

TX NAELA Summer Conference Begins
Open to Members ONLY

August 8, 2024 8:20 a.m., CT

Conference Begins

August 9, 2024

Last day to order a printed and shipped course binder
with in-person or webcast conference registration.

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