

TexasBarCLE presents the 29th Annual Course

Estate Planning & Probate Drafting

Cosponsored by the Real Estate, Probate and Trust Law Section of the State Bar of Texas

Register early and **save up to \$125!**

Lawyers licensed 5 years or less take **HALF OFF!**

(See page 4 for details.)

LIVE Dallas

October 4-5, 2018

Westin Galleria Dallas

Register by **September 20** to save!

VIDEO Houston

November 29-30, 2018

Crowne Plaza River Oaks

Register by **November 15** to save!



MCLE CREDIT

13 Hours (2 Ethics)

MCLE Course No: 174014439

Applies to the Texas Bar College and the Texas Board of Legal Specialization in Tax and Estate Planning and Probate Law.

Purpose and Scope

This program will identify, analyze, and discuss issues that arise in drafting documents in the areas of estate planning, probate, and fiduciary litigation, and will provide drafting examples and forms for the practitioner to utilize to adequately and comprehensively address these issues. Although many seasoned estate planners and probate practitioners will find much to interest and challenge them in this course, the program's goal is to deliver papers and presentations that are relevant, thoughtful, and creative for attorneys at all levels of practice in these fields, and to include updates and a discussion of trends in the changing areas of the law. Overall, the course is designed to help attendees recognize and address issues that continue to arise and evolve in their practices, with helpful tools to take back to their offices and utilize immediately.

Thursday

7.25 hours including 1.25 ethics

8:00 **Registration
Continental Breakfast
Sponsored by**



8:55 **Welcoming Remarks
Course Director**
Wendy Yates, *Brenham*
Moorman Tate Haley Upchurch & Yates

9:00 **Deeds in Estate Planning & Probate**
.75 hr
Jason L. Davis, *Houston*
Crain Caton & James

9:45 **How to Wrap Up Insolvent Estates
and Advise the Client**
.75 hr (.25 ethics)
Gus G. Tamborello, *Houston*
Gus G. Tamborello, PC
Nikki Wolff, *Dallas*
Wolff Law

10:30 **Break**

10:45 **Power of Attorney Act from the
Litigator's Side** .5 hr
Mark Caldwell, *Dallas*
Burdette & Rice

11:15 **Power of Attorney Act from the
Planner's Side** .5 hr
Lora G. Davis, *Dallas*
Davis Stephenson

11:45 **Break - Lunch Provided**

12:00 **Luncheon Presentation: Overview
of Estate Tax vs. Income Tax** .75 hr
Toby M. Eisenberg, *Plano*
Lindquist Eisenberg

12:45 **Break**

1:00 **Planning & Drafting for a Spouse's
Death** .5 hr ethics
Glen T. Eichelberger, *Houston*
Gray Reed & McGraw

1:30 **The Times Are a Changin':
New Drafting Considerations for
Non-Spousal Beneficiaries** .75 hr
Katherine Akinc, *Austin*
Brink Bennett Flaherty Golden

2:15 **It's Really Not so Simple: A New
Look at Testamentary Planning and
Drafting Considerations Between
Spouses** .75 hr (.25 ethics)
T. Aaron Dobbs, *Sugar Land*
Roberts Markel Weinberg Butler Hailey

3:00 **Networking Break**

3:15 **Trust Protector Provisions**
.5 hr (.25 ethics)
Christian S. Kelso, *Dallas*
Farrow-Gillespie & Heath

3:45 **Drafting Retirement Plan
Beneficiary Designations so They
Will Be Accepted** .75 hr
Joshua A. Sutin, *San Antonio*
Chamberlain Hrdlicka

4:30 **Drafting Guardianship Management
Trusts: A New Look at Our Familiar
Friend** .75 hr
Catherine H. Goodman, *Fort Worth*
Harris Finley & Bogle

R. Dyann McCully, *Fort Worth*
The Blum Firm

5:15-6:15 **Adjourn to Networking Social
(live site only) Sponsored by**





Friday

5.75 hours including .75 ethics

8:30 **Continental Breakfast**
Sponsored by



8:55 **Announcements**

9:00 **Using the Texas Will Reformation Scrivener's Statute** .5 hr
Donovan Campbell, Jr., *Dallas*
Rader & Campbell

9:30 **What to Know About Our Planning and Probate Files** .75 hr (.25 ethics)
Brian Thomas, *Dallas*
Burdette & Rice

10:15 **Networking Break**

10:30 **Drafting Settlement Agreements** .75 hr (.25 ethics)
Michael B. Knisely, *Austin*
Osborne Helman Knebel & Scott
Jason S. Scott, *Austin*
Osborne Helman Knebel & Scott

11:15 **Drafting Agreements for Failure to Fund a Trust or to Intentionally Not Fund a Trust** .75 hr
Mickey R. Davis, *Houston*
Davis & Willms

12:00 **Break - Lunch Provided**

12:15 **Luncheon Presentation: Negotiating and Drafting the Terms of a Donor Advised Fund Agreement** .5 hr
Shannon G. Guthrie, *Dallas*
Stephens-Guthrie
Carolyn Newham, *Dallas*
Communities Foundation of Texas

12:45 **Break**

1:00 **Drafting Marital Property Agreements** .5 hr
Lisa L. Taylor, *Harlingen*
Attorney at Law

1:30 **GRRR (Gift Return Reporting Requirements): Taming the Wild 709 Tiger** .75 hr (.25 ethics)
Christine S. Wakeman, *Dallas*
Winstead PC

2:15 **Break**

2:30 **Ancillary Probate** .5 hr
Lauren Serrano, *El Paso*
ScottHulse

3:00 **Drafting for Yourself: CYA Letters, Memos to File, Etc.** .75 hr
Moderator
C. Stephen Saunders, *Austin*
Saunders Norval Pargaman & Atkins

Panelists

Coyt Johnston, Jr., *Dallas*
Johnston Tobey Baruch
Jovana Popovich, *Houston*
Fizer Beck

3:45 **Adjourn**

Benefits of Attending a LIVE Course

- Make the connections you need for the business you want: 80% of clients come from trusted sources such as fellow attorneys.
- Be the first to learn of vital developments and potential changes in your practice area.
- Gain guidance and insight from face to face Q & A with course faculty.
- Get inspired and motivated by connecting with judges, fellow attorneys, and other professionals - many with the same issues and concerns you may have.
- Take time away from the office to focus on CLE without distractions!

Thank You to Our Sponsors



Ways to Save on This Course!

Meet the Register by Deadline and Save \$50

because early registrations help us ensure that sufficient course books, seating, and refreshments are available. Course materials and seating will be reserved for preregistrants until the start of the first topic.

GO GREEN and Save \$25

Select the PDF download ONLY for a discount.

Real Estate, Probate & Trust Law Section Members Can Save \$50

(\$25 of it provided by REPTL)

Not a member? To join, visit your My Bar Page and join online, or download a membership form from TexasBar.com/sections to pay by mail. Please do not send section membership payment with your registration fee.

Texas Bar College Members Can Save \$25

To join or learn more, visit texasbarcollege.com or call (800) 204-2222, ext. 1819.

Texas Paralegal Division Members Can Save \$25

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Earn Discounts by Registering Five or More

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HALF OFF for Attorneys Licensed in Texas 5 Years or Less!

You read that right! See the registration form.

Scholarship Information

TexasBarCLE offers scholarships for live courses, video replays, online classes, and webcasts. To apply or learn more, call 800-204-2222, x1490, Mon-Fri 8am-5pm CT. Please apply at least two weeks prior to any live/video replay course or at least one week prior to any webcast or online class.

Active Texas State, County, and Federal Judges, Administrative Law Judges, Hearing Examiners, and Judge's Staff Attorneys may attend for free, provided:

- (1) the course directly relates to the judge's/tribunal's jurisdiction,
- (2) the judge is a full-time judge or retired under a judicial retirement system and
- (3) space is available for all paying registrants. This privilege does not extend to prosecutors, receivers, trustees, other court staff, or persons serving part-time in a judicial capacity. Actual attendance is required to receive course materials.

Parking Information

is subject to change and does not guarantee available space.

If You Need Special Accommodations to Attend or Have a Food Allergy,

please contact us as soon as possible at 800-204-2222 x1748.

Registered but Can't Attend? Still Earn MCLE Credit

by (1) calling 800-204-2222 x1574 to transfer your registration to a later presentation or (2) taking the course online later. If you would rather have a refund, call 800-204-2222, ext. 1574 or fax your request to 512-427-4443.

Refund requests must be made at least one business day before the program.

FREE TO OUR REGISTRANTS! Online Videos and MP3s of the Topics

will be available to registrants 6-8 weeks after the course. Provide your e-mail address when preregistering to be notified when and how these benefits may be accessed. (Note: Presentation lengths may vary from that which was advertised.) There's no extra charge; as a registrant, you're already entitled!

Interested in Sponsoring or Exhibiting at this Course or Others?

Contact Julie Marshall at 512-427-1797 or julie.marshall@texasbar.com.

Policy of Impartiality

The State Bar of Texas does not endorse political candidates. When a candidate for the public office is included in promotion for or participates in a TexasBarCLE event, the State Bar is not taking a position for or against anyone's candidacy.

Reserve Your Hotel Room Early

Hotel rooms have been blocked at special rates on a space available basis. To make a reservation, contact the hotel and indicate that you will be attending this State Bar of Texas course.

LIVE Dallas

Westin Galleria Dallas
13340 Dallas Parkway
Dallas, TX 75240
(972) 934-9494

\$219 single/double

Deadline: September 12

Parking: Self-parking in the Galleria Mall parking garage is complimentary

Or make your reservation online at:

www.TexasBarCLE.com?a=EPPDRAFTING

The reserved block of rooms may fill up before the deadline. Act Now!



VIDEO Houston

Crowne Plaza River Oaks
2712 Southwest Freeway
Houston, TX 77098
(713) 523-8448

Parking: Self-parking is complimentary in the hotel parking lot.

No hotel rooms have been blocked for this video replay.



Course Director

Wendy Yates.....Brenham

Planning Committee

Katherine AkincAustin
Brett T. Berly Houston
Mark Caldwell Dallas
Glen T. Eichelberger Houston
Gregory T. Kimmel Tyler
Jennifer Lewis Dallas
Abigail Rosen Houston

TexasBarCLE Planning Team

Virginia Izaguirre..... Director of Program Planning
Dawn Mershon..... Sr. Program Coordinator
Brandy Lewis..... Written Materials Coordinator
Mary A. Galarza..... Meeting Planner

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