

41st Annual Course

Advanced Estate Planning & Probate



LIVE Houston • June 7-9, 2017 • The Westin Galleria

VIDEO San Antonio • August 9-11, 2017 • Hyatt Hill Country Resort & Spa

VIDEO Dallas • August 16-18, 2017 • Cityplace Events

Come a day early and attend **Intermediate Estate Planning & Probate**
(separate registration required)



MCLE CREDIT
21.5 Hours (up to 5 Ethics)

DOWNLOADABLE
Course Materials [↓](#)

TexasBarCLE.com
800.204.2222 x1574

*Education by the Bar,
for the Bar*

Intermediate Estate Planning & Probate

Cosponsored by the Real Estate, Probate and Trust Law Section of the State Bar of Texas • *Separate registration required*

Register early and **save up to \$100!**

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

(See page 6 for details.)

LIVE Houston

June 6, 2017
The Westin Galleria

VIDEO San Antonio

August 8, 2017
Hyatt Hill Country Resort & Spa

VIDEO Dallas

August 15, 2017
Cityplace Events

- ▶ Bonus materials! Course books will include **Ancillary Probates in Every State**, a quick reference guide to assist with ancillary probates.

#TBCLE



MCLE CREDIT

7 Hours (2 Ethics)

MCLE Course No: 901372275

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

Tuesday

7 hours including 2 ethics

8:00 **Registration**
Continental Breakfast Sponsored by CADENCE BANK (*live site only*)



8:55 **Welcoming Remarks**
Course Director
Katherine C. Akinc, *Austin*
Ikard Golden Jones

9:00 **Planning for Privacy in a Public World: The Ethics and Mechanics of Protecting Your Client's Privacy and Personal Security** .75 hr (.25 ethics)
Jeffrey D. Chadwick, *The Woodlands*
Winstead

9:45 **What Every Estate Planner Needs to Know About Mineral Interests** .75 hr
Dustin G. Willey, *Fort Worth*
Bourland, Wall & Wenzel

10:30 **Break**

10:45 **IP Law for Estate Planning and Probate Attorneys** .75 hr
S. Erik Combs IV, *Austin*
Pirkey Barber
Wendy C. Larson, *Austin*
Pirkey Barber

11:30 **ABLE Accounts, Arc of Texas, and Special Needs Trusts** .75 hr (.25 ethics)
Kelley M. Bentley, *Sugar Land*
Roberts Markel Weinberg Butler Hailey

12:15 **Break - Lunch Provided**

12:30 **Luncheon Presentation: A Spoonful of Sugar Helps the Premarital Agreement Go Down - Tips for Representing Perturbed Parties to Premarital Agreements** .5 hr (.25 ethics)
Christine S. Wakeman, *Dallas*
Winstead

1:00 **Break**

1:15 **Dissecting LLC Agreements** .75 hr
R. Glenn Davis, *El Paso*
ScottHulse

2:00 **IRS Lingo** .5 hr
Tina R. Green, *Texarkana*
Capshaw Green

2:30 **Complete Truth: Fiduciary Relationships and the Duty of Full Disclosure** .75 hr ethics
Michael B. Knisely, *Austin*
Osborne, Helman, Knebel, & Scott
Jason S. Scott, *Austin*
Osborne, Helman, Knebel, & Scott

3:15 **Networking Break**
Sponsored by BANK OF TEXAS



3:45 **In God We Trust; All Others Must Pay Cash: Best Practices for Intrafamily Loans** .75 hr
Brett T. Berly, *Houston*
Chamberlain Hrdlicka

4:30 **Practical CYA Advice** .75 hr (.5 ethics)
Moderator
Jerry Frank Jones, *Austin*
Ikard Golden Jones

Panelists

Kristin L. Brown, *Dallas*
Davis Stephenson
Elizabeth Nielsen, *Austin*
Nickerson Law Group

5:15 **Adjourn to Social**
Sponsored by CUMBERLAND TRUST



Intermediate Estate Planning & Probate Planning Committee

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Wesley L. Bowers Houston
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Advanced Estate Planning & Probate

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Register early and **save up to \$150!**

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

(See page 6 for details.)

LIVE Houston

June 7-9, 2017
The Westin Galleria

Register by **May 24** to save!

VIDEO San Antonio

August 9-11, 2017
Hyatt Hill Country Resort & Spa

Register by **July 26** to save!

VIDEO Dallas

August 16-18, 2017
Cityplace Events

Register by **August 2** to save!

- ▶ Registrants receive complimentary online registration for the Attorney Ad Litem Certification for Guardianship Proceedings.

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ThankYou to our Internet sponsor



Advanced Estate Planning & Probate has gone mobile!

ThankYou to our Premier Mobile App Sponsor

THE JAMES STREET GROUP, LLC

Wednesday

7.5 hours including 1.75 ethics

8:00 **Registration**
Continental Breakfast Sponsored by CADENCE BANK (live site only)



8:55 **Welcoming Remarks**
Course Director
Cameron McCulloch, *Houston*
MacIntyre McCulloch Stanfield & Young

9:00 **Case Law Update** .75 hr (.25 ethics)
Prof. Gerry W. Beyer, *Lubbock*
Texas Tech University School of Law

9:45 **Grievances and Malpractice in Estate Planning & Probate** .75 hr ethics
Claude E. Ducloux, *Austin*
Attorney at Law

10:30 **Break**

10:45 **Legislative Update** .75 hr
Craig Hopper, *Austin*
Hopper Mikeska

11:30 **Asset Protection Strategies and Recent Developments** .75 hr (.25 ethics)
Michelle Rosenblatt, *Austin*
Armbrust & Brown

12:15 **Break - Lunch Provided**

12:30 **Luncheon Presentation: Pre-Litigation Strategies in Dealing with Difficult Executors and Trustees** .5 hr
Joyce W. Moore, *San Antonio*
Langley & Banack

1:00 **Break**

1:15 **Understanding the Interplay of Venue and Jurisdiction Statutes in Different Counties** .75 hr
Lisa H. Jamieson, *Fort Worth*
Pope, Hardwicke, Christie, Schell, Kelly & Taplett

2:00 **Flexibility versus Settlor's Intent in Long-Term Trusts** 1 hr (.25 ethics)
Moderator
Glenn Karisch, *Austin*
The Karisch Law Firm

Panelists

Prof. Thomas M. Featherston, Jr., *Waco*
Baylor Law School

Frank N. Ikard, Jr., *Austin*

Ikard Golden Jones

C. Stephen Saunders, *Austin*

Saunders, Norval, Pargaman & Atkins

3:00 **Networking Break**

3:15 **HIPAA and HB 300** .75 hr (.25 ethics)

Charles Hardy, *San Antonio*

Higdon Hardy & Zuflacht

Ann Jamieson, *San Antonio*

Higdon Hardy & Zuflacht

4:00 **Revving Up Your Revocable Trust** .75 hr

Laurel Stephenson, *Dallas*

Davis Stephenson

4:45 **Recent Developments in Estate Planning** .75 hr

Prof. Stanley M. Johanson, *Austin*

The University of Texas School of Law

5:30 **Adjourn to Social Sponsored by FROST** (live site only)



MCLE CREDIT

21.5 Hours (up to 5 Ethics)

MCLE Course No: 901372274

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

CPE Credit

We have registered with the Texas State Board of Public Accountancy as a CPE sponsor. This registration does not constitute an endorsement by the board as to the quality of our program.

The State Bar's continuing education sponsor I.D. number is 135.

Texas Department of Insurance Credit

TexasBarCLE is recognized by the Texas Department of Insurance as a qualified sponsor of insurance related continuing education (sponsor I.D. 32398). A certificate of attendance is available upon request at the seminar.

Thursday

7:45 **Breakfast Presentation:**
**Tips on How to Prepare for the
TBLS Estate Planning & Probate Exam**
No MCLE Credit
Amanda Gyeszly, *Houston*
Texas Crude Energy

**Continental Breakfast Sponsored
by CADENCE BANK** (*live site only*)



TAX BREAKOUT

3.25 hours

- 8:10 **Program Introductions**
Moderator
Shannon G. Guthrie, *Dallas*
Stephens-Guthrie
- 8:15 **Understanding Deferred
Compensation in Estate Planning** 1 hr
Noel C. Ice, *Fort Worth*
Cantey Hanger
- 9:15 **Using Various Forms of Freeze or
Multi-Interest Partnerships and
LLCs to Efficiently Transfer Wealth**
.75 hr
Stacy Eastland, *Houston*
Goldman Sachs & Co.
- 10:00 **Break**
- 10:15 **Allocating GST When the GRAT
and the CLAT End** .75 hr
R. Eric Viehman, *Houston*
Ytterberg Deery Knoll
- 11:00 **Multijurisdictional Trust Tax Issues**
.75 hr
George L. Cushing, *Woburn, MA*
McLane Middleton
- 11:45 **Break - Lunch Provided**

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!

LITIGATION BREAKOUT

3.25 hours including .75 ethics

- 8:10 **Program Introductions**
Moderator
Cameron McCulloch, *Houston*
MacIntyre McCulloch Stanfield & Young
- 8:15 **Mediating Contested Probate and
Trust Disputes** 1 hr (.25 ethics)
Sam Graham, *Austin*
Attorney-Mediator-Arbitrator
Hon. Rory R. Olsen, *Houston*
Judge, Probate Court No. 3
Arielle Prangner, *Houston*
Davis & Willms
- 9:15 **Collecting Attorney's Fees in
Probate and Trust Litigation**
.75 hr (.5 ethics)
Joyce W. Moore, *San Antonio*
Langley & Banack
- 10:00 **Break**
- 10:15 **Fiduciary Litigation Case Law
Update** .5 hr
Christopher T. Hodge, *San Antonio*
Langley & Banack
- 10:45 **Litigation Involving Powers of
Attorney and Bank Accounts**
.5 hr
Mark R. Caldwell, *Dallas*
Burdette & Rice
J. Brian Thomas, *Dallas*
Burdette & Rice
- 11:15 **Judicial Tort Reform Comes to
Fiduciary Litigation** .5 hr
Brian Thompson, *Austin*
Hopper Mikeska
- 11:45 **Break - Lunch Provided**

GENERAL SESSION

4.25 hours including .75 ethics

- 12:15 **Luncheon Presentation:**
**TUP WHAT? An Introduction to the
Texas Uniform Prudent Management
of Institutional Funds Act** .5 hr
William D. Pargaman, *Austin*
Saunders, Norval, Pargaman & Atkins
- 12:45 **REPTL Distinguished Probate Attorney
Lifetime Achievement Award**
- 1:00 **Break**
- 1:15 **Drafting Partnership Agreements**
.75 hr
Daniel H. McCarthy, *Fort Worth*
Wick Phillips Gould & Martin
- 2:00 **Multijurisdictional Trust Issues**
.75 hr (.25 ethics)
George L. Cushing, *Woburn, MA*
McLane Middleton
- 2:45 **Real Estate Issues in Estate Planning &
Probate** .75 hr
Richard Melamed, *Houston*
Attorney at Law
- 3:30 **Networking Break Sponsored
by BANK OF TEXAS** (*live site only*)



- 3:45 **Won't You Be My Lawyer?
Engagements and Disengagements**
.75 hr (.5 ethics)
Shannon G. Guthrie, *Dallas*
Stephens-Guthrie
- 4:30 **Understanding Life Insurance for
Estate Planners** .75 hr
Lawrence Brody, *St. Louis, MO*
Bryan Cave
- 5:15 **Adjourn to Social Sponsored
by THE JAMES STREET GROUP, LLC**
(*live site only*)

THE JAMES STREET GROUP, LLC

Friday

6.5 hours including 1.75 ethics

- 7:45 **Breakfast Presentation: What ACTEC Means to You**
No MCLE Credit
Harry W. Wolff, Jr., *San Antonio*
Dykema Cox Smith
- Continental Breakfast Sponsored by CADENCE BANK** (*live site only*)
- 
- 8:10 **Announcements**
- 8:15 **Marital Agreements and Contracts**
.75 hr (.25 ethics)
Sarah C. Keathley, *Corsicana*
Keathley & Keathley
- R. Hal Moorman, *Brenham*
Moorman Tate Haley Upchurch & Yates
- 9:00 **Saving Your Clients'...Retirement Savings: Recent Developments in Estate Planning for Retirement Benefits** .75 hr
Robert K. Kirkland, *Liberty, MO*
Kirkland Woods & Martinsen
- 9:45 **Break**
- 10:00 **Estate Planning in Light of the New Administration - What Do We Tell Our Clients Now?** 1 hr (.25 ethics)
Stephen Akers, *Dallas*
Bessemer Trust
- Alvin J. Golden, *Austin*
Ikard Golden Jones
- Melissa J. Willms, *Houston*
Davis & Willms
- 11:00 **Recognizing Incapacity in Your Client**
.75 hr ethics
Debbie Pearson, *Austin*
Nurses Case Management
- 11:45 **Break - Lunch Provided**
- 12:00 **Luncheon Presentation: Planning with Art and Other Collectibles** .5 hr
Ramsay H. Slugg, *Fort Worth*
U.S. Trust, Bank of America Private Wealth Management
- 12:30 **Break**
- 12:45 **Alternatives to Guardianship and Why They Rarely Work**
.5 hr (.25 ethics)
Hon. Kelly M. Cross, *San Antonio*
Judge, Probate Court No. 1
- 1:15 **In Terrorem Clauses: Are They Still Terrifying?** .75 hr (.25 ethics)
Gus G. Tamborello, *Houston*
Gus G. Tamborello, PC

- 2:00 **Yes, I'll Order That Trust Fully Loaded! A Report of the ACTEC Task Force on Trust Drafting** .75 hr
Mickey R. Davis, *Houston*
Davis & Willms
- 2:45 **Trust Accounting Issues** .75 hr
Eric G. Reis, *Plano*
Thompson & Knight
- 3:30 **Adjourn**

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HERITAGE
AUCTIONS

InterActive Legal

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Ways to Save on These Courses!

Meet the Register by Deadline and Save \$50 on each course.

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 on the Intermediate Course and \$50 on the Advanced Course.

Select the PDF download ONLY for a discount.

Real Estate, Probate and Trust Law Section Members Can Save up to \$100 on the Intermediate Course and up to \$150 on the Advanced Course.

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.

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from your firm or agency. Contact Firm & Group Sales Manager Laura Angle at 512-263-2802 or laura.angle@texasbar.com

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. For Cityplace Events in Dallas, please call us in advance of your arrival so that assisted parking can be arranged for drivers of handicap-designated vehicles.

Registered but Can't Attend? Still Earn MCLE Credit

and receive course materials by (1) calling 800-204-2222 x1574 to transfer your registration to a later presentation or (2) taking the course online later, in which case you'll automatically be sent the course materials. If you wish a refund instead, mail or fax (512-427-4443) your request so that we receive it 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

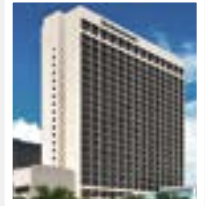
The State Bar of Texas does not endorse political candidates. When a candidate for the public office is included in promotion for or participates in a TexasBarCLE event, the State Bar is not taking a position for or against anyone's candidacy.

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 Houston

The Westin Galleria
5060 West Alabama
Houston, TX 77056
713-960-8100
\$185 single or double
Deadline: May 15



Make your reservation online:

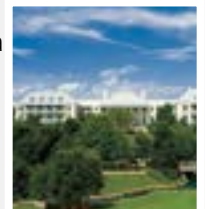
<http://www.TexasBarCLE.com?a=WESTINSTATEPRO>

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

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

VIDEO San Antonio

Hyatt Hill Country Resort and Spa
9800 Hyatt Resort Drive
San Antonio, TX 78251
210-647-1234
\$215 single or double
Deadline: July 18



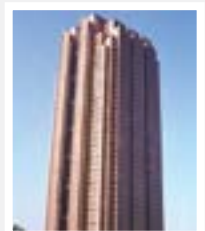
Make your hotel reservation online:

<http://www.TexasBarCLE.com?a=HYATTESTATEPRO>

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

VIDEO Dallas

Cityplace Events
2711 N. Haskell Avenue
Dallas, TX 75204
214-515-5100



No rooms have been blocked for this video.

Parking: Self-parking is complimentary with validation from State Bar of Texas staff.

WAYS TO REGISTER

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credit card only

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P.O. Box 972298
Dallas, TX 75397-2298
check or credit card

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E-mail Laura Angle at
laura.angle@texasbar.com
for group discount
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Advanced Estate Planning & Probate Course
Intermediate Estate Planning & Probate Course

1 Advanced Estate Planning & Probate Course [5000]
Houston LIVE, June 7-9, 2017

- Regular Registrant..... \$795
- Take \$50 OFF:** Register by May 24
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San Antonio VIDEO, August 9-11, 2017

- Regular Registrant..... \$695
- Take \$50 OFF:** Register by July 26
- Licensed 5 years or less, **HALF OFF** \$347.50*

Dallas VIDEO, August 16-18, 2017

- Regular Registrant..... \$695
- Take \$50 OFF:** Register by August 2
- Licensed 5 years or less, **HALF OFF** \$347.50*

Intermediate Estate Planning & Probate Course [5003]

Houston LIVE, June 6, 2017

- Regular Registrant \$345
- Take \$50 OFF:** Register by May 24
- Licensed 5 years or less, **HALF OFF** \$172.50*

San Antonio VIDEO, August 8, 2017

- Regular Registrant \$295
- Take \$50 OFF:** Register by July 26
- Licensed 5 years or less, **HALF OFF** \$147.50*

Dallas VIDEO, August 15, 2017

- Regular Registrant \$295
- Take \$50 OFF:** Register by August 2
- Licensed 5 years or less, **HALF OFF** \$147.50*

I may attend complimentary because I am a (see p. 6):
 Qualifying judge Judge's staff attorney

**No discounts in section 3 may be taken.*

- 2** I want my **Advanced Course** materials format to be:
- Hard copy books as well as a PDF download of same (both formats included in registration fee)
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 - OR **\$50 OFF** because I'm a member of the State Bar of Texas Real Estate, Probate & Trust Law Section (\$25 of it provided by REPTL)

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For more information on joining the section, see page 6.

- 4** I can't attend, but would like the materials.
- FREE** Shipping & Handling
 - Advanced Course hard copy set \$230⁺
 - Intermediate Course hard copy book \$85⁺

To order a discounted PDF download of course materials, search Publications at TexasBarCLE.com (available 1-2 weeks after the course).

5 My total is \$_____ . I am paying by:

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MP3 files of topics will be downloadable from TexasBarCLE.com 6-8 weeks after the course. For information on other course products, contact our Flash CLE service at 800-204-2222, x1575.

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TexasBarBooks

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Texas Probate System includes:

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