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

### Tuesday
7 hours including 2 ethics

<table>
<thead>
<tr>
<th>Time</th>
<th>Event</th>
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| 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  
Tina R. Green, Texarkana  
Capshaw Green |
| 2:30 | Complete Truth: Fiduciary Relationships and the Duty of Full Disclosure  
.75 hr (.25 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 |

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**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.
Advanced Estate Planning & Probate

TexasBarCLE presents the 41st Annual Course

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

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.

#TBCLE

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
Mancilne 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. Ducloix, 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)

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ThankYou to our Premier Mobile App Sponsor
THE JAMES STREET GROUP, LLC

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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.
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!

TAX BREAKOUT

3.25 hours

8:10 Program Introductions
Moderator
Shannon G. Guthrie, Dallas
Stephens-Guthrie

8:15 Understanding Deferred Compensation in Estate Planning
Noel C. Ice, Fort Worth
Cantey Hanger

9:15 Using Various Forms of Freeze or Multi-Interest Partnerships and LLCs to Efficiently Transfer Wealth
Stacy Eastland, Houston
Goldman Sachs & Co.

10:00 Break

10:15 Allocating GST When the GRAT and the CLAT End
R. Eric Viehman, Houston
Ytterberg Deery Knull

11:00 Multijurisdictional Trust Tax Issues
George L. Cushing, Woburn, MA
McLane Middleton

11:45 Break - Lunch Provided

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
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
Joyce W. Moore, San Antonio
Langley & Banack

10:00 Break

10:15 Fiduciary Litigation Case Law Update
Christopher T. Hodge, San Antonio
Langley & Banack

10:45 Litigation Involving Powers of Attorney and Bank Accounts
Mark R. Caldwell, Dallas
Burdette & Rice
J. Brian Thomas, Dallas
Burdette & Rice

11:15 Judicial Tort Reform Comes to Fiduciary Litigation
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
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
Daniel H. McCarthy, Fort Worth
Wick Phillips Gould & Martin

2:00 Multijurisdictional Trust Issues
George L. Cushing, Woburn, MA
McLane Middleton

2:45 Real Estate Issues in Estate Planning & Probate
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
Shannon G. Guthrie, Dallas
Stephens-Guthrie

4:30 Understanding Life Insurance for Estate Planners
Lawrence Brody, St. Louis, MO
Bryan Cave

5:15 Adjourn to Social Sponsored by THE JAMES STREET GROUP, LLC (live site only)
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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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.

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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=WESTINESTATEPRO

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.

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Advanced Estate Planning & Probate Course
Intermediate Estate Planning & Probate Course

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  Probate & Trust Law Section (provided by REPTL)

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

I can’t attend, but would like the materials.
FREE Shipping & Handling
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†Plus 8.25% sales tax on total course book sales only. Please include sales tax or attach an exemption certificate. Book orders are shipped separately 1-2 weeks after the live program. Please include payment by check or supply credit card information on this form.

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