

36th Annual

Advanced Estate Planning & Probate Course



Hyatt Hill Country Resort and Spa
San Antonio

HIGHLIGHTS:

- Decanting Irrevocable Trusts
- Digital Assets
- Beneficiary Grantor Trusts
- Collaborative Law

Stay all week and attend

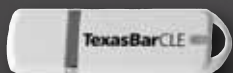
Estate Planning & Probate 101
and *Intermediate Estate Planning*

MCLE CREDIT | 20.25 HOURS (3 ETHICS)

LIVE SAN ANTONIO
June 27-29, 2012

VIDEO HOUSTON
August 1-3, 2012

VIDEO DALLAS
August 22-24, 2012



Course materials available on a USB drive



Estate Planning & Probate 101

SAN ANTONIO SITE ONLY !

(Separate registration required)

Monday

- 10:00 **Registration**
- 10:40 **Welcoming Remarks**
Course Director
Omar Javier Leal, *Corpus Christi*
Branscomb, P.C.
- 10:45 **Client Interview/Engagement**
.75 hr (.25 ethics)
- 11:30 **Estate Planning** 1.5 hr (.25 ethics)
- 1:00 **Break - Lunch Served**
- 1:15 **Lunch Presentation: Question and Answer** .25 hr
- 1:30 **Probate Process** 1.5 hr (.25 ethics)
- 3:00 **Guardianships** .75 hr (.25 ethics)
- 3:45 **Question and Answer** .25 hr
- 4:00 **Adjourn**

FACULTY

Course Director

Omar Javier Leal, *Corpus Christi*
Branscomb, P.C.

Jason Flaherty, *Austin*
Bennett Flaherty

Catherine H. Goodman, *Fort Worth*
Shannon, Gracey, Ratliff & Miller

Karen Hogan, *San Antonio*
Bexar County Probate Court #1

Colin L. Murchison, *Fort Worth*
Jackson Walker

MCLE CREDIT

5 HOURS (1 ETHICS)

MCLE COURSE NO: 901239391

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

Intermediate Estate Planning & Probate

(Separate registration required)

LIVE SAN ANTONIO
JUNE 26, 2012

VIDEO HOUSTON
July 31, 2012

VIDEO DALLAS
August 21, 2012

So you have the basics down...the "mom and pop wills," all the ancillary documents...you even know how to draft a living trust and a pour over will. But where do you go from there in order to expand your practice capabilities and keep up with the changing estate tax laws? You know acronyms like: ILIT, GRAT, GST, and CLT but....what do they actually mean?

Depending on what Congress does (or, more aptly, does not do) in the coming year, many estate planners who have not historically needed to incorporate tax planning into their practices may suddenly need to add some tax-planning vehicles to their toolboxes come January 1, 2013. This course addresses the ins and outs of taking that next step from basic wills to more sophisticated planning techniques and approaches.

Tuesday

- 8:00 **Registration**
Coffee & Pastries Provided
- 8:45 **Welcoming Remarks**
Course Director
Brooke Hardie, *Austin*
Saunders, Norval, Nichols & Atkins
- 9:00 **Disclaimer Bypass Trusts** .75 hr
Michael Johnson, *Austin*
Cook Brooks Johnson
- 9:45 **Irrevocable Life Insurance Trusts**
.75 hr
Wesley L. Bowers, *Houston*
FizerBeck
- Arielle Prangner, *Houston*
Davis & Willms
- 10:30 **Break**
- 10:45 **Family Limited Partnerships & Other Entity Planning** .75 hr
Claiborne L. Cowan, *Austin*
Malish & Cowan
- 11:30 **GRATs** .75 hr
Amanda R. Doslich, *Houston*
Winstead
- 12:15 **Break - Lunch Served**
- 12:45 **Luncheon Presentation: "Can You Do It? Yes You CAN! (But Should You?)"** .75 hr ethics
Katherine C. Akinc, *Austin*
Ikard Golden Jones
- Deborah Green, *Austin*
The Law Offices of Deborah Green
- Farren Smith, *Pflugerville*
Law Office of Farren Smith

- 1:30 **Break**
- 1:45 **Charitable Planning for Clients Who Aren't Wealthy** .75 hr
Brooke Hardie, *Austin*
Saunders, Norval, Nichols & Atkins
- 2:30 **The 123s of GST** .75 hr
Brett Berly, *Houston*
Chamberlain, Hrdlicka, White,
Williams & Aughtry
- 3:15 **Break**
- 3:30 **Key Provisions in Wills & Trusts That Can Make or Break You** .75 hr
Frances Bennett, *Austin*
Bennett Flaherty
- Hazel Sanchez, *Austin*
Law Offices of Rhonda H. Brink
- 4:15 **Coordination of Non-Probate Assets** .75 hr
Shelli A. Harveson, *Fort Worth*
The Law Office of Shelli A. Harveson
- Olin Ragsdale, *Fort Worth*
CLU, AEP, CES—Estate Analyst
- 5:00 **Adjourn**

MCLE CREDIT

6.75 HOURS (.75 ETHICS)

MCLE COURSE NO: 901241615

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

Advanced Estate Planning & Probate Course

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

Real Estate, Probate and Trust Law Section members can **save \$75!**

LIVE SAN ANTONIO

June 27-29, 2012

Register by June 13, 2012
and **save \$50!**

VIDEO HOUSTON

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Register by July 18, 2012
and **save \$50!**

VIDEO DALLAS

August 22-24, 2012

Register by August 8, 2012
and **save \$50!**

TexasBarCLE Advanced Courses are sponsored by LexisNexis, a division of Reed Elsevier Inc.



Registrants for the Advanced Course will receive these benefits:

- Complimentary online registration for the Guardianship Ad Litem Certification Course
- Breakfast each day sponsored by Encore Trust (San Antonio only)
- Lunch each day
- Networking social sponsored by Frost Financial Management Group (San Antonio only)
- Ice Cream Break sponsored by HFBE, Inc. (San Antonio only)

Wednesday

8 hours including 1 ethics

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

8:50 **Welcoming Remarks**
Course Director
Tina R. Green, *Texarkana*
Capshaw Green

9:00 **Case Law Update** 1 hr (.25 ethics)
Prof. Gerry W. Beyer, *Lubbock*
Texas Tech University School of Law,
Governor Preston E. Smith Regents
Professor of Law

10:00 **Trustee Disclosure** .75 hr (.5 ethics)
Moderator
Glenn M. Karisch, *Austin*
The Karisch Law Firm

Mary E. Haught, *Austin*
Ikard Golden Jones

Jeffrey T. Knebel, *Austin*
Osborne, Helman, Knebel & Deleery

10:45 **Break**

11:00 **To Apply for Guardianship or Not** .75 hr (.25 ethics)
Lisa H. Jamieson, *Fort Worth*
Shannon Gracey Ratliff & Miller

Laura Upchurch, *Brenham*
Moorman, Tate, Urquhart, Haley,
Upchurch & Yates

11:45 **Choice of Entity: Issues for Estate Planners** .75 hr
David Peter Dunning, *Fort Worth*
Bourland, Wall & Wenzel

12:30 **Break - Lunch Provided**

12:50 **Luncheon Presentation: Digital Assets** .75 hr
Prof. Naomi Cahn, *Washington, D.C.*
George Washington University Law
School, John Theodore Fey Research
Professor of Law

1:35 **Break**

1:45 **Property Taxes and Title Insurance: Issues and Answers for the Estate Lawyer** .75 hr
Michael A. Wren, *Austin*
McGinnis, Lochridge & Kilgore

2:30 **Creditors' Claims in Dependent and Independent Administrations** .75 hr
M. Keith Branyon, *Fort Worth*
Jackson Walker

3:15 **Planning in a Cross-border World** .75 hr
Gavin F. Leckie, *New York, NY*
Managing Director, JP Morgan Chase

4:00 **Break**

4:15 **What Texas Lawyers Need to Know About Louisiana Law** .75 hr
W. Deryl Medlin, *Shreveport, LA*
McMichael, Medlin, D'Anna,
Wedgeworth & Lafargue

5:00 **Tax Law Update** 1 hr
Prof. Stanley M. Johanson, *Austin*
University of Texas School of Law,
Fannie Coplin Regents Chair

6:00 **Adjourn to Social Sponsored by Frost Financial Management Group**
(San Antonio only)

Thursday

7 hours including 1.75 ethics

8:00 **Continental Breakfast Sponsored by Encore Trust**

8:55 **Announcements**

9:00 **Estate Planning Issues with Intra-family Loans** .75 hr
Stephen R. Akers, *Dallas*
Bessemer Trust Company

9:45 **New Rules in an Independent Administration and How to Deal With Them** .75 hr
C. Boone Schwartzel, *Houston*
Attorney at Law

10:30 **Break**

10:45 **Decanting Irrevocable Trusts** .75 hr (.25 ethics)
Melissa J. Willms, *Houston*
Davis & Willms

11:30 **The Power to Appoint or Disappoint: Anatomy of Power of Appointment** .75 hr
Gene Wolf, *El Paso*
Kemp Smith

12:15 **Break - Lunch Provided**

12:35 **Lunch Presentation: A New Model for Alternative Dispute Resolution in Trust and Estate Practice** .75 hr (.5 ethics)
Moderator

Rhonda H. Brink, *Austin*
Law Offices of Rhonda H. Brink

Angeline Lindley Bain, *Dallas*
Goranson, Bain, Larsen, Greenwald, Maultsby & Murphy

Harry L. Munsinger, *San Antonio*
Munsinger & Munsinger

1:20 **Privilege Issues in the Estate Planning Arena** .75 hr ethics
Stephanie Loomis-Price, *Houston*
Winstead

2:05 **Current Issues Related to Estate Planning with IRAs and Qualified Plans** .75 hr
Karen Gerstner, *Houston*
Karen S. Gerstner & Associates

2:50 **Ice Cream Networking Break**
Sponsored by Howard Frazier Barker Elliot, Inc.

3:25 **Beneficiary Defective Trusts: Drafting the Dream Trust** .75 hr
Lora G. Davis, *Dallas*
K&L Gates

4:10 **Business Succession Planning** 1 hr (.25 ethics)
Louis A. Mezzullo, *Rancho Santa Fe, CA*
McKenna Long & Aldridge

5:10 **Adjourn**

SPONSORS

TexasBarCLE would like to thank the following sponsors for their contributions to the 36th Annual *Advanced Estate Planning and Probate Course*.



Friday

5.25 hours including .25 ethics

8:00 **Continental Breakfast Sponsored by Encore Trust**

8:55 **Announcements**

9:00 **Gift Planning in 2012** .75 hr

R. Eric Viehman, *Houston*

Ytterberg Deery Knull

9:45 **Farm and Ranch Properties – Family Legacy or Liability?** .75 hr

Moderator

Susan Armstrong, *Austin*

Armstrong Law

David Braun, *Dripping Springs*

Braun & Gresham

Bruce T. Morrison, *Austin*

Law Offices of Bruce Morrison

10:30 **Break**

10:45 **Options for Closing the Estate Administration: What They Are and When They Should/Should Not Be Used** .75 hr (.25 ethics)

Sarah Patel Pacheco, *Houston*

Crain Caton & James

11:30 **The Top Ten Things an Estate Planner Should Know About Elder Law** .75 hr

Molly Dear Abshire, *Bellaire*

Wright Abshire

12:15 **Break - Lunch Provided**

12:30 **Luncheon Presentation: Proposed Uniform Power of Attorney Act** .75 hr

Craig S. Adams, *Tyler*

Adams & Coker

Frank Z. Ruttenburg, *San Antonio*

Winstead

Donald L. Totusek, *Dallas*

Francis, Orr & Totusek

1:15 **Break**

1:30 **Fiduciaries Within Fiduciaries** .75 hr

Mary C. Burdette, *Dallas*

Calloway, Norris, Burdette & Weber

2:15 **Top Ten Things to Take Away** .75 hr

Shannon G. Guthrie, *Bedford*

Benenati Law Firm

C. Stephen Saunders, *Austin*

Saunders, Norval, Nichols & Atkins

3:00 **Adjourn**

MCLE CREDIT

20.25 HOURS (3 ETHICS)

MCLE COURSE NO: 901216341

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

CPA 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 (Sponsor I.D. 135).

TEXAS DEPARTMENT OF INSURANCE

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 course.

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Tina R. Green Texarkana

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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 pre-registrants until the start of the first topic.

Real Estate, Probate and Trust Law Section Members Can Save \$75 by registering no later than the "Register by" date for that course (thereafter, save \$25); see the registration form. Not a member? To join, email sections@texasbar.com or phone 800-204-2222, x1425. Please do not send Section membership payment with your registration fee.

Earn Discounts by Registering Five or More from your firm or agency. Contact Firm & Group Sales Manager Laura Angle of TexasBarSolutions at 512-250-5575 or laura.angle@texasbar.com.

Active State and Texas-Area Federal Judges and Their Court Staff Attorneys May Attend for Free provided (1) the course is directly related to the judge's tribunal's jurisdiction, (2) the judge is a full-time judge or retired under the Texas Judicial Retirement System and (3) space is available for all paying registrants. This privilege does not extend to receivers, trustees, other court staff, or persons serving part-time in any judicial capacity. NOTE: Actual attendance is required in order to receive course materials.

Parking Information for Attendees is subject to change without notice and is not a guarantee of available space. San Antonio: Self-parking is complimentary. Houston: Self-parking in the garage is complimentary for registrants of the State Bar seminar. Dallas: Self-parking is complimentary.

If You Need Special Accommodations to Attend, please contact us as soon as possible at 800-204-2222, x1797.

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; see "FREE TO OUR REGISTRANTS!" below. However, 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, as Well as PDFs of Course Materials, will be available to registrants 6-8 weeks after the course. Provide us your email address when registering and we'll alert you when these benefits are available and how to access them. (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 Kanice Spears at 512-427-1404 or kanice.spears@texasbar.com.

Policy of Impartiality The State Bar of Texas does not endorse political candidates. When a candidate for 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 - San Antonio

June 27-29, 2012 Hyatt Hill Country Resort and Spa

9800 Hyatt Resort Drive San Antonio, TX 78251 (210) 647-1234 \$215 single/double

Hotel deadline: May 25, 2012

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



VIDEO - Houston

August 1-3, 2012 Crowne Plaza River Oaks

2712 Southwest Freeway Houston, TX 77098 (713) 523-8448

No rooms have been blocked for this video.



VIDEO - Dallas

August 22-24, 2012 Doubletree by Hilton

4099 Valley View Lane Dallas, TX 75244 (972) 385-9000

\$109 single/double

Hotel deadline: July 21, 2012

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



Online

TexasBarCLE.com
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**Registering
five or more?**

E-mail Laura Angle at
laura.angle@texasbar.com
for group discount
information.

On the Advanced Course
save up to **\$175!**

Advanced Estate Planning & Probate Course

5000

1

Register me for:

Advanced Estate Planning & Probate Course [5000]

- San Antonio LIVE, June 27-29** **\$745**
Take \$50 OFF: Register by **June 13, 2012**
- Houston VIDEO, August 1-3** **\$645**
Take \$50 OFF: Register by **July 18, 2012**
- Dallas VIDEO, August 22-24** **\$645**
Take \$50 OFF: Register by **August 8, 2012**

Intermediate Estate Planning & Probate [5003]

- San Antonio LIVE, June 26** **\$245**
- Houston VIDEO, July 31** **\$195**
- Dallas VIDEO, August 21** **\$195**

Register for both the Advanced and Intermediate courses and take an additional \$100 off! See section 3 at right. (Discount not available online; must register by mail, fax, or phone.)

Estate Planning and Probate 101 [5001]

(San Antonio site only. No discounts under section 3 apply.)

- San Antonio, June 25** **\$145**

I may attend complimentary because:

- I am a qualifying judge or court staff attorney** (see p. 6).
- I am a State Bar College Gold Member**
(Questions? Visit texasbarcollege.com)

2

I want my Advanced Course materials format to be:

- Electronic materials (PDFs on a USB drive)
- Hard-copy materials (2 notebooks)
- BOTH so I'll **ADD \$115**

3

I'm entitled to the following discounts:

- \$100 OFF** because I'm registering for both the Advanced and Intermediate courses.
- \$50 OFF** because I'm registering by the "Register by" date at the left. (If by mail, date of postmark will be determinative.)
- \$25 OFF** because (choose 1 box only) I am a member of the
 - Real Estate, Probate and Trust Law Section
 - State Bar College Classic Membership
 - Legal Administrators / Paralegal Div.
- OR I'm licensed 2 years or less.

4

I can't attend. Just send course materials.*

FREE Shipping & Handling

- Advanced Course materials Book set USB drive . . \$230 each[†]
- Intermediate Estate Planning & Probate Book USB. \$85 each[†]
- Estate Planning & Probate 101 Book USB \$85 each[†]

For audio CDs of the course topics, contact our DVD CLE service at 800-204-2222, x1575. MP3 files of the topics will be downloadable from the Online Classroom at TexasBarCLE.com 6-8 weeks after the course.

5

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

- Check (enclosed) payable to the State Bar of Texas for \$_____
- Visa MasterCard AMEX Discover

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A confirmation of your registration will be sent to the e-mail address you provide.

**PDFs of course materials will be available for purchase 6-8 weeks after the course in the Online Library at TexasBarCLE.com. Registrants receive access to the PDFs at no additional charge (see "Free to Our Registrants" in this brochure).*

†Plus 8.25% sales tax on total. Please include sales tax or attach an exemption certificate. Book and USB orders are shipped separately and filled 4-6 weeks after the live program. A bill will be sent unless a credit card charge is authorized on this form.

QUESTIONS?
800-204-2222, x1574 • 512-427-1574

State Bar of Texas
P.O. Box 12487
Austin, TX 78711-2487

36th Annual Advanced Estate Planning & Probate Course

LIVE June 27-29, 2012 San Antonio

VIDEO August 1-3, 2012 Houston

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