



LIVE Dallas

Westin Galleria

October 9-10, 2014

25TH ANNUAL ESTATE PLANNING & PROBATE DRAFTING

Hot Topics

- Handbooks for Executors and Trustees
- Drafting to Head off Disputes
- Drafting Trusts with an Eye Toward Flexibility
- How to Get Your Probate Matter e-Filed... and Accepted
- Marital Property Agreements and Real Estate Drafting for the Estate Planner

Course Amenities

- Coffee and breakfast provided each morning
- Lunch provided both days
- Complimentary wireless connection in the meeting room
- Convenient access to electrical connections - bring your laptop!
- Complimentary parking at both sites
- Networking Social on Thursday night (Dallas site only)

VIDEO Houston

Crowne Plaza River Oaks

November 20-21, 2014

DOWNLOADABLE
COURSE MATERIALS



MCLE CREDIT | 13 HOURS (2.5 ETHICS)

25TH ANNUAL ESTATE PLANNING & PROBATE DRAFTING

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

LIVE Dallas

Westin Galleria

October 9-10, 2014

Register by September 25
and **save \$50!**

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Real Estate, Probate & Trust Law Section
Members can **save up to \$100**
(\$25 of it provided by REPTL)

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Crowne Plaza River Oaks

November 20-21, 2014

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Real Estate, Probate & Trust Law Section
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#TBCLEestate

MCLE CREDIT

13 HOURS (2.5 ETHICS)

MCLE COURSE NO: 901292796

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.

Thursday

7.5 hours including 1.5 ethics

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

8:25 **Welcoming Remarks**
Course Director
Melissa J. Willms, *Houston*
Davis & Willms

8:30 **Drafting to Head off Disputes**
.75 hr
Cameron McCulloch, *Houston*
MacIntyre McCulloch Stanfield &
Young

9:15 **Tales from the Dark Side: Drafting
Issues from the Fiduciary's
Perspective** .75 hr
Stephen Akers, *Dallas*
Bessemer Trust

10:00 **Snack Break**
Sponsored by FROST

10:15 **Drafting to Integrate Retirement
Plans into the Estate Plan** .75 hr
Karen S. Gerstner, *Houston*
Karen S. Gerstner & Associates

Diane V. Perrin, *Houston*
Farner & Perrin

11:00 **What Every Trustee Should Know**
.75 hr (.25 ethics)
Mary C. Burdette, *Dallas*
Calloway Norris Burdette & Weber

11:45 **Break - Lunch Provided**

12:00 **Luncheon Presentation:
Cybersecurity - Protecting the
Things We Draft** .75 hr ethics
Rose Romero, *Dallas*
Thompson & Knight

Special Agent, *Dallas*
Cyber Crime Task Force
Federal Bureau of Investigation

12:45 **Break**

1:00 **Drafting the Beneficiary Flexible
Trust** .75 hr
Jeff Chadwick, *The Woodlands*
Winstead PC

1:45 **Drafting Distribution Provisions:
Mean What You Say and Say
What You Mean** .75 hr
Leslie Kiefer Amann, *Houston*
Sentinel Trust Company

2:30 **Doing the Deed: Drafting Tips for
Real Estate Documents**
.75 hr
Barton R. Bentley, *Houston*
Fizer Beck Webster Bentley &
Scroggins

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

3:30 **How to Not Fund the
Testamentary Trust**
.75 hr (.25 ethics)
Michele A. Mobley, *Austin*
DuBois, Bryant & Campbell

4:15 **A Rose by Any Other Name:
Utilizing and Drafting Powers for
Trustees, Trustee Advisors, and
Trust Protectors** .75 hr (.25 ethics)
Shyla R. Buckner, *Amarillo*
Sprouse Shrader Smith

Michelle Rosenblatt, *Austin*
Richards Rodriguez & Skeith LLP

5:00 **Adjourn to Social**
Sponsored by CADENCE

Purpose & Scope

The Drafting Course is intended to be practical, even though some of what we do may seem impractical at times! This course is the only one for estate planning and probate practitioners specifically designed so that speakers provide forms and drafting examples that practitioners can use as go-bys for their own practice — an amazing tradition and resource for 25 years! To help us hone our skills as estate planning and probate lawyers, the speakers will highlight issues we should watch for with our clients and various ways we can address those issues. The goal of the planning committee is to provide something for everyone, whether you are a seasoned practitioner or someone newer to the practice, whether your practice focuses on estate planning, trust and estate administration, or probate litigation, and regardless of the complexity of your practice. Overall, the course is designed to help us be better lawyers for our clients and to recognize and address issues that continue to evolve.

Friday

5.5 hours including 1 ethics

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

8:25 **Announcements**

8:30 **Drafting and Enforcing Settlement Agreements** .75 hr
Keri Brown, *Houston*
Baker Botts

9:15 **Compliance: The Proper Preparation and Filing of Wealth Transfer Tax Returns** 1 hr
Lee C. Schwemer, *Arlington*
The University of Texas at Arlington

10:15 **Snack Break**
Sponsored by
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10:30 **Marital Property Agreements - Where Family Law Attorneys and Estate Planning Attorneys Collide** .75 hr (.25 ethics)
Paige Ben-Yaacov, *Houston*
Baker Botts

Katie A. Custer, *Houston*
Fullenweider Wilhite

11:15 **What Every Executor Should Know** .75 hr (.25 ethics)
Craig Hopper, *Austin*
Hopper Mikeska

12:00 **Break - Lunch Provided**

12:15 **Luncheon Presentation: e-Filing - What Do the Technology Standards Mean?** .5 hr
Hon. Steve M. King, *Fort Worth*
Judge, Tarrant County Probate Court One

12:45 **Break**

1:00 **Drafting Estate Plans in a Post-Windsor World** .75 hr (.25 ethics)

- Impact of new laws on existing estate plans for both same-gender spouses and committed couples
- Drafting tools for "recognized" and "non-recognized" same-gender spouses
- Steps that may be needed to update plans post-Windsor

John F. Bergner, *Dallas*
Winstead

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

1:45 **Drafting with High Exemptions and Portability** 1 hr (.25 ethics)
Jason R. Flaherty, *Austin*
Bennett Flaherty

2:45 **Adjourn**

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the meeting room:



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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 preregistrants until the start of the first topic.

Real Estate, Probate & Trust Law Section Members Can Save \$100

(\$25 of it provided by REPTL) by registering by the "Register by" date (thereafter, save \$50). Not a member? To join, e-mail 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

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HALF OFF for Attorneys Licensed 5 Years or Less!

You read that right! See the registration form.

Need Financial Assistance to Attend?

TexasBarCLE offers a limited number of scholarships to attend a live course, video replay, archived online class, or webcast, or to subscribe to our Online Library. To apply or to learn more, call Mon-Fri 8am-5pm CT to Sara at 800-204-2222, x1490. Please apply at least four weeks prior to the CLE event.

Active State and Texas-Area 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 the 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 for Attendees Not Staying at the Hotel

is subject to change and does not guarantee available space.

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

HOUSTON: Self-parking in the Crowne Plaza parking garage is complimentary with State Bar staff validation.

If You Need Special Accommodations to Attend,

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

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 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 by Sept 19

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

The Westin Galleria

13340 Dallas Parkway

Dallas, TX 75240

972-934-9494

\$179 per night

Deadline: September 19

<http://tinyurl.com/mnmrc8x>



VIDEO Houston

Crowne Plaza River Oaks

2712 Southwest Freeway

Houston, Texas 77098

713-523-8448

Ask for the special State Bar of Texas room rate.



Course Director

Melissa J. Willms.....Houston

Planning Committee

Stephen Akers Dallas
 Paige Ben-Yaacov Houston
 Rhonda H. Brink Austin
 Shyla R. Buckner Amarillo
 Mary C. Burdette Dallas
 Lora G. Davis Dallas
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Registering

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Estate Planning & Probate Drafting Course

5055

1 Estate Planning & Probate Drafting Course [5055]

Dallas LIVE, October 9-10, 2014

- Regular Registrant** \$645
Take \$50 OFF: Register by **September 25, 2014**
- Licensed 5 years or less, HALF OFF** \$322.50*
**No discounts in section 3 may be taken.*

Houston VIDEO, November 20-21, 2014

- Regular Registrant** \$545
Take \$50 OFF: Register by **November 6, 2014**
- Licensed 5 years or less, HALF OFF** \$272.50*
**No discounts in section 3 may be taken.*

I may attend complimentary because I am a (see p. 4):

- Qualifying judge
- Judge's staff attorney.

Registration includes:

- Coffee and breakfast provided each morning
- Lunch provided both days
- Complimentary wireless connection in the meeting room
- Convenient access to electrical connections - bring your laptop!
- Complimentary parking at both sites
- Networking Social on Thursday night (Dallas site only)

2 I want my course materials format to be:

- Hard copy book as well as a PDF download of same (both formats included in registration fee)
- PDF download ONLY so I'll **take \$25 OFF**

3 I'm entitled to 1 or 2 discounts:

- \$50 OFF** because I'm a member of the Real Estate Probate and Trust Law Section (\$25 of it provided by REPTL)
- \$25 OFF** because (choose 1 box only) I'm a member of the
 - State Bar College
 - Paralegal Division

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

- FREE Shipping & Handling**
- Hard copy book \$155 (plus tax; see footnote[†])

To order a discounted PDF download of course materials (available 4-6 weeks after the course), search **Publications** at TexasBarCLE.com.



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.

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

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QUESTIONS?

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SECTION OF THE STATE BAR OF TEXAS

Over 7,000 of the lawyers licensed in Texas are members of the Real Estate, Probate and Trust Law Section, making it the second-largest section of the State Bar.

Members receive the official online quarterly, The REPTL Reporter, containing case law summaries, feature articles, and news. They also enjoy access to the Section's online collection of CLE materials from recent real estate, probate and trust law seminars, as well as access to the latest work product of REPTL committees. Another member benefit is a \$100 discount off the annual subscription price to TexasBarCLE's Online Library (regularly \$295). Lastly, membership in REPTL allows for a discount on numerous publications from Thomson West.



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