32nd Annual
Advanced Estate Planning and Probate Course

**LIVE**
Dallas
June 11-13, 2008

**VIDEO**
San Antonio
August 6-8, 2008

**VIDEO**
Houston
September 17-19, 2008

**PLUS!**
- Nuts & Bolts of Estate Planning and Probate
- Attorney Ad Litem Certification for Guardianship Proceedings
- What Was I Thinking? Estate Planning and Probate Practice Management: Tips and The Top Ten Things to Avoid
# TexasBarCLE presents the 32nd Annual Advanced Estate Planning and Probate Course

LIVE
Dallas
June 11-13, 2008
Westin Galleria Hotel Dallas

VIDEO
San Antonio
August 6-8, 2008
Hyatt Regency Hill Country Resort & Spa

VIDEO
Houston
September 17-19, 2008
Hilton Houston Westchase

## Wednesday 7.5 hours

<table>
<thead>
<tr>
<th>Time</th>
<th>Event</th>
</tr>
</thead>
<tbody>
<tr>
<td>7:45</td>
<td>Registration</td>
</tr>
<tr>
<td>8:00</td>
<td>Continental Breakfast Sponsored by ENCORE TRUST (Live Site Only)</td>
</tr>
</tbody>
</table>
| 8:30 | Welcoming Remarks and Program Introductions | **Course Director**
William D. Pargaman, Austin Brown McCarroll |
| 8:45 | Estate Planning Gems | **.75 hr** |
John F. Bergner, Dallas Winstead |
| 9:30 | When the Only One You Trust is Yourself - Drafting and Planning with Self Trusteed Irrevocable Nongrantor Trusts | **.75 hr** |
Toby M. Eisenberg, Dallas Bisignano and Harrison |
| 10:15 | Break |
| 10:30 | Case Law Update | **.75 hr** |
Gerry W. Beyer, Lubbock Governor Preston E. Smith Regents Professor of Law Texas Tech University School of Law |
| 11:15 | Probate Code Recodification Project Overview | **.25 hr** |
Thomas M. Featherston, Jr., Waco Mills Cox Professor of Law Baylor University School of Law
Barbara McComas Anderson, Dallas Law Offices of Barbara McComas Anderson |
| 11:30 | REPTL Awards Ceremony | **Glenn M. Karisch, Austin The Karisch Law Firm** |
Harry W. Wolff, Jr., San Antonio Cox Smith Matthews Incorporated |
| 11:45 | Break to pick up lunch |
| 12:00 | Luncheon Presentation: Discounts Without the Glitz | **.75 hr** |
Alan K. Davis, Dallas Meadows Collier Reed Cousins & Blau |
| 12:45 | Break |
| 1:00 | Top Ten Things Estate Planners/Guardians Need to Know About Medicaid | **.5 hr** |
H. Clyde Farrell Austin Law Office of H. Clyde Farrell |
| 1:30 | Court Created Trusts Including Legislative Changes | **.5 hr** |
Deborah A. Green, Austin The Law Offices of Deborah Green |
| 2:00 | The Perfect Estate Plan - But Did You Plan for the Disabled Beneficiary? | **.5 hr** |
Patricia F. Sitchler, San Antonio Schoenbaum, Curphy & Scanlan |
| 2:30 | Poison Pill Provisions | **.5 hr** |
M. Keith Branyon, Fort Worth Jackson Walker |
| 3:00 | Break |
| 3:15 | Real Property Management Issues for the Fiduciary | **.5 hr** |
| 3:45 | Trustees’ Duties to Disclose Information to Beneficiaries | **.75 hr** |
Frank N. Ikard, Jr., Austin Ikard & Golden |
| 4:30 | Tax Law Update | **1 hr** |
Stanley M. Johanson, Austin Fannie Coplin Regents Chair University of Texas School of Law |
| 5:30 | Adjourn |
| 5:45 | Social Sponsored by Frost Financial Management Group |

### Wednesday evening video - Attorney Ad Litem Certification for Guardianship Proceedings

<table>
<thead>
<tr>
<th>Time</th>
<th>Event</th>
</tr>
</thead>
<tbody>
<tr>
<td>5:30</td>
<td>Registration and Check-In (Light Snack Provided)</td>
</tr>
<tr>
<td>5:45</td>
<td>Alternatives to Guardianship</td>
</tr>
</tbody>
</table>
Mary Lou Cassidy, Midland Stubbeman, McRae, Sealy, Laughlin & Browder |
| 6:30 | Guardianship Application and Administration: A Primer | **.75 hr** (25 hr ethics) |
Hon. Steve M. King, Fort Worth Judge, Probate Court No. 1 Tarrant County |
| 7:15 | Break |
| 7:30 | Role of the Attorney Ad Litem and Guardian Ad Litem | **.75 hr** (25 hr ethics) |
Karen Hogan, San Antonio Court Investigator Probate Court No. 1 Bexar County |
| 8:15 | Case Law Update | **1 hr** |
Steven D. Fields, Fort Worth Court Administrator Probate County No. 2 Tarrant County
Terry W. Hammond, El Paso President, Hammond Townsend Allala |
| 9:15 | Adjourn |

### 3.25 HOURS (.75 ETHICS) MCLE COURSE NO: 900039285
Qualifies for Attorney Ad Litem Certification. Applies to the College of the State Bar of Texas and to the Texas Board of Legal Specialization in Estate Planning and Probate Law, Family Law, Tax Law and Civil Trial Law.
### Thursday afternoon Breakout Sessions  
**LITIGATION BREAKOUT**

<table>
<thead>
<tr>
<th>Time</th>
<th>Session Title</th>
<th>Speaker(s)</th>
</tr>
</thead>
<tbody>
<tr>
<td>12:45</td>
<td>Cross Examination of Experts</td>
<td>David J. Beck, Houston, Beck Redden &amp; Secrest</td>
</tr>
<tr>
<td>1:30</td>
<td>Open and Close Like a Spell-binder: Presentation Skills That Capture, Move and Persuade in the 21st Century</td>
<td>Justin M. Campbell III, Houston, Campbell Harrison &amp; Dagley</td>
</tr>
<tr>
<td>2:15</td>
<td>Evidentiary Issues - How to Get Your Documents Admitted and Your Evidence Before the Jury</td>
<td>Jimmy Walker, Houston, Dinkins Kelly Lenox Lamb &amp; Walker</td>
</tr>
<tr>
<td>3:00</td>
<td>Power Break Sponsored by Howard Frazier Barker Elliott Inc.</td>
<td></td>
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<tr>
<td>3:15</td>
<td>Drafting a Judgment That Works and Collecting on Your Judgment</td>
<td>Stuart R. Schwartz, El Paso, Scott &amp; Hulse</td>
</tr>
<tr>
<td>4:00</td>
<td>Extraordinary Remedies in Probate Disputes</td>
<td>J. Craig Hopper, Austin, Hill, Ducloux, Carnes &amp; Hopper</td>
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</tbody>
</table>

### TAX BREAKOUT

<table>
<thead>
<tr>
<th>Time</th>
<th>Session Title</th>
<th>Speaker(s)</th>
</tr>
</thead>
<tbody>
<tr>
<td>12:45</td>
<td>Hot Topics in Gift and Estate Taxation</td>
<td>Tina R. Green, Texarkana, Patton Roberts</td>
</tr>
<tr>
<td>1:30</td>
<td>What Every Estate Planner Should Know About Securities Law</td>
<td>Patrick J. Pacheco, Houston, Vice President/Wealth Advisor</td>
</tr>
<tr>
<td>2:15</td>
<td>The Spousal ILIT - Taxation, Planning, and Drafting</td>
<td>Santo (Sandy) Bisignano, Jr., Dallas, Bisignano and Harrison</td>
</tr>
<tr>
<td>3:00</td>
<td>Power Break Sponsored by Howard Frazier Barker Elliott Inc.</td>
<td></td>
</tr>
<tr>
<td>3:15</td>
<td>Defined-Value Transfers</td>
<td>Stephen T. Dyer, Houston, Baker Botts</td>
</tr>
<tr>
<td>4:00</td>
<td>Installment Sale Panel</td>
<td>Cheryl Cain Crabbe, Houston, Winstead</td>
</tr>
<tr>
<td>5:00</td>
<td>Adjourn</td>
<td></td>
</tr>
</tbody>
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### 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. 0375). A certificate of attendance is available upon request at the course.
Friday
5.75 hrs including 1.5 hrs ethics

8:00  Continental Breakfast
Sponsored by ENCORE TRUST
(Live Site Only)

8:30  Planning for Unmarried Couples
.75 hr (.25 hr ethics)
Kathryn G. Henkel, Dallas
K & L Gates

9:15  Joint Family Probate  .75 hr
Mary C. Burdette, Dallas
Calloway, Norris, Burdette & Weber
Paula K. Larsen, Dallas
Goranson, Bain, Larsen, Greenwald, Maultsby & Murphy

10:00 Fiduciary Duties and Potential Liabilities Relating to Charitable Entities  .5 hr (.25 hr ethics)
Darren B. Moore, Fort Worth
Bourland, Wall & Wenzel

10:30 Break

10:45 Discretionary Distributions Panel
1 hr
Moderator
Sarah Patel Pacheco, Houston
Crain Caton & James
Alvin J. Golden, Austin
Ikard & Golden
Cynthia M. Hatchett, Houston
V.P, Senior Fiduciary Officer
JP Morgan Chase Private Client Services
Marjorie J. Stephens, Dallas
Law Offices of Marjorie J. Stephens

11:45 Break to pick up lunch

12:00 Luncheon Presentation: Landmines for Lawyers  .75 hr ethics
Linda C. Goehrs, Houston
Horrigan & Goehrs
W. Cameron McCulloch, Jr., Houston
MacIntyre & McCulloch

12:45 Break

1:00 Hot Topics: Marital Property Issues Affecting the Trusts and Estates Practice  .75 hr
Thomas M. Featherston, Jr., Waco
Mills Cox Professor of Law
Baylor University School of Law

1:45 Releases and Receipts and Judicial Accounting  .75 hr (.25 hr ethics)
Joyce W. Moore, San Antonio
Langley & Banack

2:30 Powers of Attorney Battles  .5 hr
Lisa H. Jamieson, Fort Worth
Shannon Gracey Ratliff & Miller

3:00 Adjourn

Texas Guardianship Manual, Texas Probate System
And Texas Contingency Planning

25% Discount for Course Attendees Only!
Use the registration form in this brochure to order now.

Texas Guardianship Manual (2d ed.)
With more than 140 pages of detailed practice notes and 185 forms, this comprehensive manual is an essential practice guide for attorneys in Texas who handle guardianship matters.
• Texas Guardianship Manual (2d ed.) Includes Texas Guardianship Manual on Disk.
  —Special price for course attendees only (through 01/11/08) $188 (regularly priced @ $250)

Texas Probate System (3d rev. ed.)
This comprehensive volume provides a complete system containing all materials necessary for handling a decedent’s estate. Includes Texas Probate System Forms on Disk.
• Texas Probate System (2d rev. ed.)
  —Special price for course attendees only (through 01/11/08) $206 (regularly priced @ $275)

Contingency Planning: The Texas Practitioners Guide to Powers of Attorney and Other Alternatives to Guardianship
Designed for lawyers in every field of practice, this convenient softbound book provides valuable advice for the Texas attorney in making plans for financial and medical care and in providing knowledgeable and cost-effective legal support to clients facing the same concerns. A free CD containing full text of book plus all forms is included.
• Contingency Planning: The Texas Practitioners Guide to Powers of Attorney and Other Alternatives to Guardianship
  —Special price for course attendees only (through 01/11/08) $34 (regularly priced @ $45)

21.75 HOURS (2.75 ETHICS)
MCLE COURSE NO: 900039244
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.
TexasBar CLE would like to thank the following sponsors for their contributions to the 2008 Advanced Estate Planning and Probate Course.

**TexasBar CLE**

**FACULTY**

**Moderator**

- Tina R. Green, Texarkana
- Patton Roberts
- Alan D. Gluth, El Paso
- Ryan & Sanders & Gluth
- Amanda M. Gyeszly, Houston
- Fizer Beck Webster Bentley & Scroggins
- Michael W. Johnson, Austin
- Osborne, Helman, Knebel & Deleery
- John K. Ross IV, Texarkana
- Ross & Shoalmire

**What Was I Thinking?**

Estate Planning and Probate Practice Management: Tips and the Top Ten Things to Avoid

**Topics**

- Client Relationship Building/Communicating Effectively With Your Client
- Financial Management and Billing Practices
- Using Technology and Tools to Manage Your Practice

**Moderator:**

Deborah Green, Austin
The Law Offices of Deborah Green

**Panelists**

- Brooke Hardie, Austin
  Law Offices of Brooke Hardie
- Geraldine Tucker, Austin
  Attorney at Law

**Sponsors**

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- EncoreTrust
- ProDoc
COURSE INFORMATION

Register Early and Save $50
by registering at least two weeks before the course. Early registrations help us ensure that sufficient course materials, seating, and refreshments are available. Registrations are accepted on a space-available basis. Course materials and seating will be reserved for pre-registrants until the start of the first topic. No confirmation will be sent; pick up your name tag and course materials at the program.

Real Estate, Probate and Trust Law Section Members Can Save Up To $80
because the Section cosponsors this course. If you belong to the Section, or you agree to join by the date of the course, you save $30; see the registration form. To join the Real Estate, Probate and Trust Law Section, please contact the State Bar’s Sections Coordinator, Kathy Casarez, at 800-204-2222, x1420. Please do not send payment for Section membership with your registration fee.

Qualifying Judges
may attend free of charge, provided (1) the course is directly related to the jurisdiction of their tribunal, (2) they are full-time judges or judges retired under the judicial retirement system, and (3) space is available after admission of all paid registrants. Judges must actually attend to receive course materials. This privilege does not extend to receivers, trustees, court staff, or persons serving part-time in any judicial capacity.

If You Register But Cannot Attend
you can still earn participatory MCLE credit and receive course materials. First, consider transferring your registration to a later presentation of the course; to do so, call 800-204-2222, x1574. Second, as a registrant, you are entitled to special benefits (see “Two Free Online Benefits For Course Registrants,” below.) However, if you wish to receive a refund instead, mail or fax (512-427-4111) your request so that we receive it at least one business day before the program. Registrants who do not attend will be sent the course materials.

Two Free Online Benefits for Course Registrants
will be available 6-8 weeks after the course: (1) streaming video and audio versions of each presentation and (2) electronic versions of the course materials. (Actual length of a presentation may vary from that which was advertised.) To access these benefits, log onto TexasBarCLE.com. To view videos, look under “Your Online Classroom” and click on “Free Classes from Seminars You’ve Attended.” For course materials, check our home page for “Your Online Library.” Below that, click on “Free Articles from Seminars You’ve Attended.” Remember: there’s no extra charge. As a registrant, you’re already entitled!

MP3 CDs
require an MP3-compatible device (e.g., an iPod or a CD/MP3 player) for playback. Older CD Players may not play MP3 CDs. Most computers can play MP3 CDs.

Persons with Disabilities
who need special accommodations to attend should contact us as soon as possible at 800-204-2222, x1797.

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.

Real Estate, Probate and Trust Law Section of the State Bar of Texas
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David W. Tomek Chair-Elect/Secretary
Harry W. Wolff, Jr. Treasurer
Philip D. Weller Immediate Past Chair

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Hon. David Keltner Chair, CLE Committee
Van Galen Hilley Chair, Board PDP Committee
John Edwards Executive Director
Patrick A. Nester Director, TexasBarCLE

Reserve Your Hotel Room Early
Because there are a limited number of special reduced rate hotel rooms for registrants for the live program in Dallas. Inform the hotel that you be attending the State Bar of Texas Advanced Estate Planning and Probate Course.

Dallas (Live)
Westin Galleria Hotel Dallas
13340 Dallas Parkway
972-934-9494
$169/night
Deadline: May 12, 2008*

San Antonio (Video)
Hyatt Hill Country Resort & Spa
9800 Hyatt Resort Drive
210-647-1234
$192/night
Deadline: July 8, 2008*

Houston (Video)
Hilton Houston Westchase
9999 Westheimer
713-974-1000
$159/night
Deadline: August 25, 2008*

* The reserved block of rooms may fill up before the deadline. Act now!
Advanced Estate Planning and Probate Course 2008

1 Check boxes to select course/site:

- Advanced Estate Planning & Probate Course [5000]
  - Dallas LIVE, June 11-13 $645
    Early Registration Deadline: May 28
  - San Antonio VIDEO, August 6-8 $595
    Early Registration Deadline: July 23
  - Houston VIDEO, September 17-19 $545
    Early Registration Deadline: September 2

Special offer for Advanced Course registrants:
- Texas Guardianship Manual** for just $188†
- Texas Probate System** for just $206†
- Contingency Planning** for just $34†

Attorney Ad Litem Certification for Guardianship [5002]
(No discounts or late fees apply.)
- I’m registering for the Advanced Course FREE
- Dallas, June 11 $75
- San Antonio, August 6 $75
- Houston, September 17 $75

Nuts & Bolts of Estate Planning & Probate [5001]
(No discounts or late fees apply.)
- Dallas LIVE, June 10 $125
- San Antonio VIDEO, August 5 $125
- Houston VIDEO, September 16 $125

What Was I Thinking? Practice Management Program [3700]
(No discounts or fees apply.)
- Dallas LIVE, June 10 $75

2 Check all applicable boxes below to calculate your fee:

- Add $50 if registering for the Advanced Course after the Early Registration Deadline. (If registration is by mail, date of postmark will determine if this fee applies.)
- Subtract $25 if you are a member of the State Bar Real Estate, Probate and Trust Law Section; OR if you are a member of the State Bar College; OR State Bar Legal Administrators or Paralegal Division; or if you have been licensed 2 years or less.
- No charge for Qualifying Judge

My payment after all calculations above: $ _______

3 I can’t attend. Just send course materials.*

- Advanced Course $230 set†
- Set of Advanced Course audio MP3 speeches on CD†† $225 per set†
- Set of Advanced Course audio CDs $345 per set†
- Nuts & Bolts book $85 each†
- Guardianship Course book $85 each†
- Perfecting Your EPP Practice CD-ROM $45 per set†
- Texas Guardianship Manual** $250 each†
- Texas Probate System** $275 each†
- Contingency Planning** $45 each†

4 I am paying by:

- Check (enclosed) payable to State Bar of Texas for $______
- Visa ☐ MasterCard ☐ AMEX ☐ Discover ☐

Account No. ____________________________ Exp. Date __________
Name on card (Please print) ____________________________________________
Signature _____________________________________________________________

5 Bar Card or State Bar Membership No. ________________________________

Name _____________________________
Firm Name/Court ________________________________
Address for Bar-Related Mail _____________________________________________
City/State __________________________ Zip _______________
Phone ( ) ______________________ Fax ( ) __________________
E-Mail: ____________________________

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

*Online versions (PDFs) of course materials will be available for purchase 6-8 weeks after the course in the Online Library at TexasBarCLE.com. Course registrants receive access to the PDFs at no additional charge (see “Two Free Online Benefits for Course Registrants” in this brochure).
†Plus 7.25% tax (8.25% for Austin address) on total. Book orders and audio CD orders are shipped separately and filled approximately 4 weeks after the first live program. You will be billed unless you authorized a credit card charge above.
††Requires MP3-compatible player for playback. Older CD players may not play MP3s. See “MP3 CDs” under “Course Information.”
**This discounted book offer is not available online. When you place an order, future updates will automatically be sent to you with a bill. Return privileges apply. You may cancel this service at any time by contacting the State Bar Sales Desk.
If it’s a TexasBarCLE course, you’re in luck. We tape nearly everything we present, so you can watch it anytime, anywhere you want—and earn participatory MCLE credit.

Through our Custom CLE service, you have access to a full range of State Bar resources—highly regarded as among the best in the nation, featuring expert practitioners and reference-quality written materials.

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