

**SCOPE** The Docket Call in Probate Court seminar is designed as a “nuts-and-bolts” course on estate planning, probate, guardianships, trusts, and fiduciary litigation for probate and estate planning practitioners, general practitioners, trust officers, and CPAs.

**TUITION** The registration fee for attendance on both days of the seminar, including all written materials, is \$525 if the registration fee is received **before Friday, January 23, 2026**, and is \$550 if the registration fee is received **after Friday, January 23, 2026**. A portion of the seminar proceeds will benefit one or more local charities as selected by the Board of Governors for the San Antonio Estate Planners Council (the “SAEPC”).

**WRITTEN MATERIALS** Course written materials may be purchased for \$300 in lieu of attending the seminar. Attendance at the seminar whether in person or by Zoom will receive all course written materials; however, attendance by Zoom will receive course material electronically only.

**ATTENDANCE** A discount for attendance by Zoom is not provided. Further, a discount for attending only a portion of the seminar is not provided.

**REGISTRATION** Limited seating is available. Please register early to ensure attendance. Refunds of registration fees (less a \$50 administrative fee) will be made only if requested in writing and received by Patty Vargas **before Friday, January 30, 2026**. Registrants not timely requesting a refund will be mailed course materials on a USB drive.

**ATTORNEYS** Approval for Minimum Continuing Legal Education credit by the State Bar of Texas Committee on MCLE, the State Bar College, the Texas Center for the Judiciary and the Texas Board of Legal Specialization in an amount up to 14 credit hours, of which up to 3.50 hours will apply to legal ethics/professional responsibility credit, is currently pending.

**GUARDIANSHIP CERTIFICATION** The course is also meant to meet the requirements of the Texas Estates Code Section 1054.201 and the Texas Government Code Section 81.114, which provides for attorney instruction on guardianship issues and certification for attorneys who wish to represent any person’s interest in a guardianship proceeding, including an attorney ad litem. Guardianship certification is currently pending.

**CPAs** San Antonio Estate Planners Council is registered with the Texas State Board of Public Accountancy to offer courses. It is anticipated that the course will be approved for continuing professional education credit, which approval is currently pending.

**CTFAs** Approval by the ABA Professional Certifications for continuing education credits may be sought by the SAEPC. If the SAEPC obtains credit, this will be announced at the seminar, and certification holders must self-report their credits at [www.aba.csod.com](http://www.aba.csod.com).

**CFP** Approval is currently pending for CFP certification/designation. Certification holders must self-report their credit.

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San Antonio Estate Planners Council  
c/o Patty Rouse Vargas  
Davis & Santos, PLLC  
507 East Blanco  
Boerne, Texas 78006

## PREMIER UNDERWRITERS

**Langley Banack**  
*Thursday Breakfast*

**Exencial Wealth**  
*Thursday Lunch*

**theKFORDgroup**  
*WiFi*

**Frost Bank Wealth Advisors**  
*Charging Stations*

**KW Heritage**  
*USB Drives and Lanyards*

**Happy State Bank**  
*Friday Breakfast*

**Argent Trust Company**  
*Friday Lunch*

**Amarillo National Bank**  
*Power Sponsor*

**Clark Hill**  
*Zoom Connection*

## GRAND UNDERWRITERS

**Jefferson Bank**  
*Thursday Beverage Sponsor*

**Bank of Texas**  
*Thursday Morning Break*

**Gardner Law**  
*Thursday Afternoon Break*

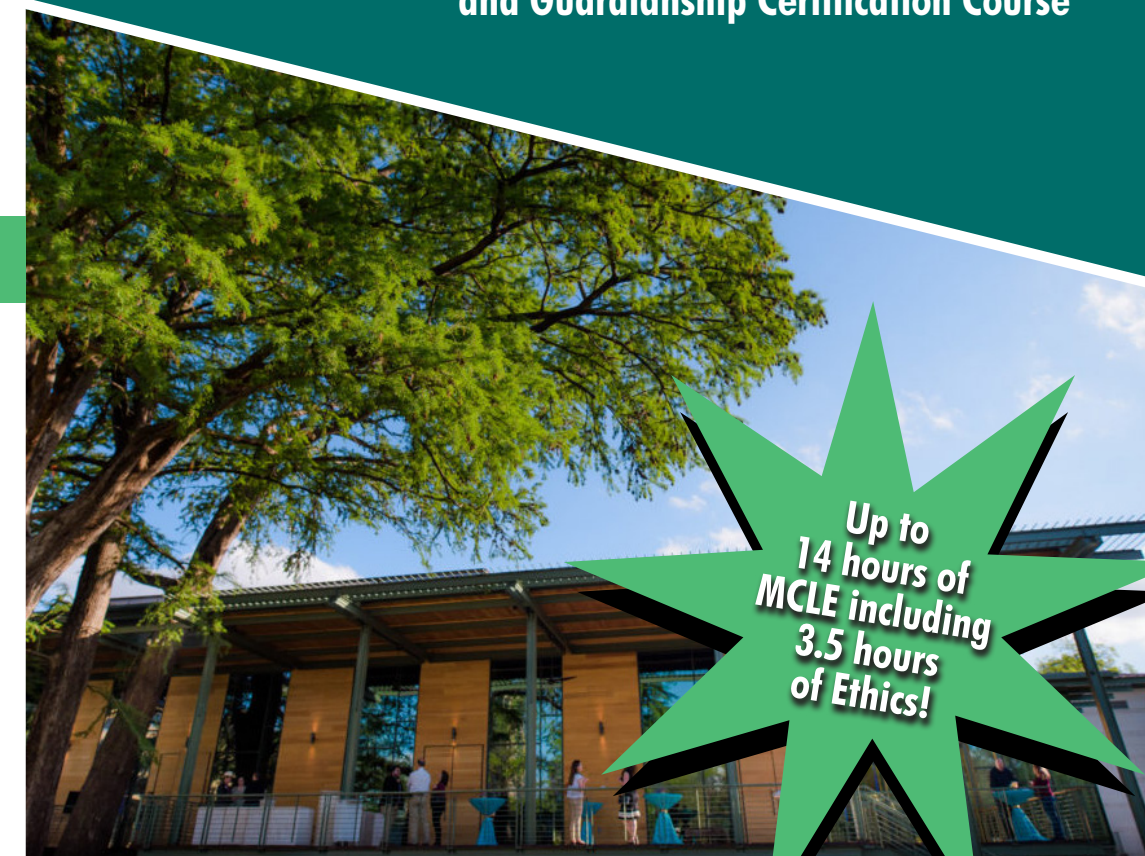
**Broadway Bank**  
*Friday Beverage Sponsor*

**Davis & Santos, PLLC**  
*Friday Morning Break*

# San Antonio Estate Planners Council

## DOCKET CALL IN PROBATE COURT

An Estate Planning, Probate and Guardianship Law Seminar  
and Guardianship Certification Course



Up to  
14 hours of  
MCLE including  
3.5 hours  
of Ethics!

# FEBRUARY 12-13, 2026

## MAYS FAMILY CENTER AT THE WITTE MUSEUM

3801 Broadway | San Antonio, Texas 78209

# PROGRAM

## THURSDAY, FEBRUARY 12, 2026

7:30 – 8:20	Registration
8:20 – 8:30	<b>Welcome</b> Patty Rouse Vargas, San Antonio Davis & Santos, PLLC
<i>Thursday Breakfast – Langley Banack</i>	
8:30 – 9:30 (1 hour) (1/2 hour ethics)	<b>Guardianship Practice and Procedures</b> Hon. Veronica Vasquez, San Antonio Statutory Probate Judge, Bexar County, Probate Court No. 2
9:30 – 10:20 (1 hour)	<b>The 2025 Texas Estate and Trust Legislative Update</b> Meredith McIver, Austin Ytterberg Deery Knull, LLP
10:20 – 10:40	<i>Morning Break – Bank of Texas</i>
10:40 – 11:10 (1/2 hour)	<b>Charitable Organizations and Charitable Giving</b> Katy David, San Antonio Steptoe & Johnson, PLLC
11:10 – 12:00 (1 hour)	<b>Mental Health from the Perspective from the Bench</b> Hon. Oscar J. Kazen, San Antonio Statutory Probate Judge, Bexar County, Probate Court No. 1
12:00 – 1:35  (1 hour) (1/2 hour ethics)	<i>Lunch – Exencial Wealth</i>
	<b>Best Practices in the Bexar County Probate Courts</b> Martin J. Collins, San Antonio Staff Attorney, Bexar County Probate Court No. 1 Sherry Barnash, San Antonio Staff Attorney, Bexar County Probate Court No. 1 John P. Arnold, San Antonio Staff Attorney, Bexar County Probate Court No. 2 Julia G. Hernandez, San Antonio Staff Attorney, Bexar County Probate Court No. 2 Jacque Nikodym, San Antonio Staff Attorney, Bexar County Probate Court No. 3 Courtenay Euton, San Antonio Staff Attorney, Bexar County Probate Court No. 3
1:35 – 2:35 (1 hour)	<b>Attorneys’ Fees in Estate and Trust Litigation</b> Christopher T. Hodge, San Antonio Langley Banack
2:35 – 3:25 (1 hour)	<b>Oil, Gas &amp; Mineral Management and Alternative Energy for Estate Planners</b> Erik Ahlenius, San Antonio Jefferson Bank Brett Ridings, San Antonio Jefferson Bank
3:25 – 3:45	<i>Afternoon Break – Gardner Law</i>
3:45 – 4:45 (1 hour)	<b>Estate Planning Best Practices</b> Jessica A. Newill, San Antonio Gardner Law
4:45	<i>Adjourn</i>

## FRIDAY, FEBRUARY 13, 2026

7:30 – 8:20	Registration
8:20 – 8:30	<b>Announcements</b> Patty Rouse Vargas, San Antonio Davis & Santos, PLLC
<i>Friday Breakfast – Happy State Bank</i>	
8:30 – 9:30 (1 hour) (1/2 hour ethics)	<b>The Role of the Ad Litem</b> Hon. Barbie Scharf-Zeldes, San Antonio Statutory Probate Judge, Bexar County, Probate Court No. 3
9:30 – 10:20 (1 hour) (1 hour ethics)	<b>Fiduciary Duties for Attorneys</b> Santos Vargas, San Antonio Davis & Santos, PLLC
10:20 – 10:40	<i>Morning Break – Davis &amp; Santos, PLLC</i>
10:40 – 11:10 (1/2 hour)	<b>What I Wish I Had Known</b> Hon. Matthew W. Brown, San Antonio Associate Judge, Bexar County Probate Court No. 1 Hon. Ben A. Wallis, III, San Antonio Associate Judge, Bexar County Probate Court No. 2
11:10 – 12:00 (1 hour)	<b>Community Property and Separate Property</b> Kimberly C. Ford, San Antonio theKFORDgroup
12:00 – 1:30	<i>Lunch – Argent Trust Company</i>
12:00 – 1:30 (1 hour) (1/2 hour ethics)	<b>Morals from the Courthouse: A Study of Recent Texas Cases Impacting the Wills, Probate, and Trust Practice</b> Gerry W. Beyer, Lubbock Governor Preston E. Smith Regents Professor of Law Texas Tech University School of Law
1:30 – 2:20 (1 hour)	<b>Capacity Considerations in Estate Planning and Guardianships</b> Jason E. Schillerstrom, M.D., San Antonio UT Health San Antonio Department of Psychiatry and Behavioral Sciences
2:20 – 3:20 (1 hour) (1/2 hour ethics)	<b>Alternatives to Guardianships</b> Carmen Samaniego, Boerne Carmen Samaniego Attorney at Law
3:20	<i>Adjourn</i>

# REGISTRATION FEES & DEADLINES

Please note that we would prefer people to register online by going to [www.sanantonioepc.org](http://www.sanantonioepc.org)

**\$525** if Registration is received by January 23, 2026

**\$550** if Registration is received after January 23, 2026

Name: \_\_\_\_\_

Company/Firm: \_\_\_\_\_

Address: \_\_\_\_\_

Email: \_\_\_\_\_

Occupation: \_\_\_\_\_

\_\_\_\_\_ I am unable to attend. For \$300, I would like a USB drive of the course materials to be sent to me by mail at the address provided above.

\_\_\_\_\_ I prefer to attend by Zoom.

\_\_\_\_\_ I am attending and paying by:  
☐ Check made payable to SAEPC  
☐ Credit card

Credit Card Number: \_\_\_\_\_

Expiration Date: \_\_\_\_\_ Security Code: \_\_\_\_\_

Name on Card (print): \_\_\_\_\_

Signature: \_\_\_\_\_

I would prefer the format of my course materials to be:

☐ USB drive ☐ Hard Copy Binder

### Submit Registration Form as Follows:

Patty Rouse Vargas  
Davis & Santos, PLLC  
507 East Blanco, Boerne, Texas 78006  
Office: (210) 853-5882