

EDUCATION

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 15 credit hours, of which up to 3 hours will apply to legal ethics/professional responsibility credit, is currently pending. 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 an applicant in a guardianship proceeding or who wish to be appointed as a court-appointed attorney in guardianship proceedings. 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 up to 12 hours of continuing professional education credit.

TRUST OFFICERS – Approval by the Institute of Certified Bankers for continuing education credits for CTFAs is currently pending. It is anticipated that the course will be approved for up to 12 hours of credit.

CFP, CLU, ChFC – Approval is pending for these certifications/designations.

SCOPE – The Docket Call in Probate Court seminar is designed as a “nuts-and-bolts” course on estate planning, probate and guardianship for probate practitioners, general practitioners, trust officers, CPAs and chartered life underwriters.

TUITION – The registration fee for attendance on both days of the seminar, including all written materials, is \$450 if registration is received before January 31, 2018. After January 31, 2018, the registration fee for attendance on both days of the seminar, including all written materials, is \$500. Course written materials may be purchased for \$250. A discount for attendance for a portion of the seminar is not provided. A portion of the seminar proceeds will benefit one or more local charities as selected by the Board of Directors for the SAEPC.

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 February 5, 2018. Registrants not timely requesting a refund will be mailed course materials. Substitutions are permitted at the discretion of the course directors.

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DUNCAN, BRESSLER & LIU, INC.
1020 N.E. Loop 410, Suite 500
San Antonio, Texas 78209

UNDERWRITERS

Broadway Bank
Texas Financial Partners
Strasburger & Price, LLP
Langley & Banack, Incorporated
The Trust Company
BKD, LLP

Thursday Breakfast
Thursday Morning Break
Thursday Afternoon Break
Friday Morning Break
Friday Afternoon Break
Beverage Sponsor

CONTRIBUTORS

Duncan, Bressler & Liu, Inc.
Granstaff, Gaedke & Edgmon, P.C.
Hornberger, Fuller & Garza Incorporated

Intercontinental Wealth Advisors, LLC
Santos Vargas

EXHIBITORS

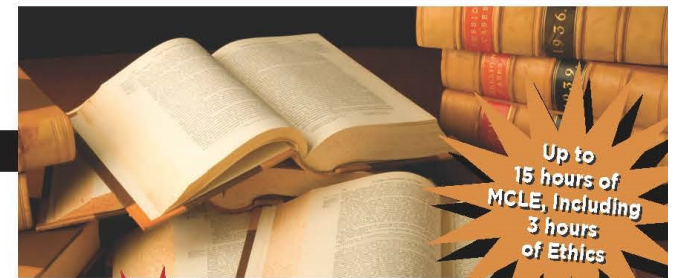
Cathy Howell, R.N.
Regions Private Wealth Management
River City Bonding
Sage Care Management
The Forum at Lincoln Heights/The Haven & The Laurels in Stone Oak
The HartBeat



San Antonio
Estate Planners Council
Presents

DOCKET CALL IN PROBATE COURT

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



FEBRUARY 15-16, 2018
Jack Guenther Pavilion at the Briscoe
210 West Market Street, San Antonio, TX 78205

Jefferson Bank Trust
Frost Bank
Exencial Wealth Advisors
Regions Private Wealth Management
Wells Fargo Private Bank
theKFORdgroup
J.P. Morgan Private Bank

WiFi
Friday Breakfast and Key Note Speaker
3rd Floor Room Designation
Thursday Lunch
Friday Lunch
Charging Stations
Live Stream

PROGRAM

Thursday, February 15, 2018

WiFi Password: JeffersonBankTrust

7:30 – 8:20	THURSDAY BREAKFAST AND REGISTRATION Underwriter – BROADWAY BANK
8:20 – 8:30	Welcome Patty Rouse Vargas, San Antonio DUNCAN, BRESSLER & LIU, INC.
8:30 – 9:00 (30 minutes) (20 minutes ethics)	Best Practices in the Bexar County Probate Courts Jamie M. Mathis, San Antonio STAFF ATTORNEY, BEXAR COUNTY PROBATE COURT NO. 1 Martin J. Collins, San Antonio STAFF ATTORNEY, BEXAR COUNTY PROBATE COURT NO. 2
9:00 – 9:30 (30 minutes) (20 minutes ethics)	Dos and Don'ts Connie Perez, San Antonio AUDITOR, BEXAR COUNTY PROBATE COURT NO. 1 Liz McDevitt, San Antonio AUDITOR, BEXAR COUNTY PROBATE COURT NO. 2
9:30 – 10:20 (50 minutes)	Introduction to Texas Probate and Administration Craig Hopper, Austin HOPPER MIKESKA, PLLC
10:20 – 10:40	MORNING BREAK Underwriter – TEXAS FINANCIAL PARTNERS
10:40 – 11:30 (50 minutes)	Know When to Hold 'Em; Known When to Fold 'Em... The 2017 Texas Estate and Trust Legislative Update William D. Pargaman, Austin SAUNDERS, NORWAL, PARGAMAN & ATKINS, LLP
11:30 – 12:00 (30 minutes)	Deeds of Gift, Enhanced Life Estate Deeds, Transfer on Death Deeds or Executor's Deeds – Which Way Do I Go? Kristen Quinney Porter, New Braunfels KRISTEN QUINNEY PORTER, LLC
12:00 – 1:35 (50 minutes) (15 minutes ethics)	LUNCH Underwriter – REGIONS PRIVATE WEALTH MANAGEMENT Trustees' Fiduciary Duties and Litigation Santos Vargas, San Antonio DAVIS & SANTOS, P.C. Matthew K. Williamson, San Antonio DUNCAN, BRESSLER & LIU, INC.
1:35 – 2:15 (40 minutes) (20 minutes ethics)	Landmines in the Estates Code and in Probate Practice J. Barrett Shipp, San Antonio HEINRICHS & DEGENNARO, P.C. Robert W. Bondurant, San Antonio BONDURANT LAW, PLLC
2:15 – 3:15 (60 minutes)	How Not To Pay the Piper - Creditors and Estates R. Keith Morris, III, Houston OSTROM MORRIS, PLLC
3:15 – 3:35	AFTERNOON BREAK Underwriter – STRASBURGER & PRICE, LLP
3:35 – 4:25 (50 minutes)	Planning for Digital (and Other "Hard to Plan For") Assets Harry W. Wolff, III, San Antonio DYKEMA COX SMITH
4:25 – 5:05 (40 minutes)	Oil and Gas Issues in Estate Planning and Probate Robert M. Park, San Antonio UHL, FITZSIMONS, JEWETT & BURTON, PLLC
5:05	Adjourn

Friday, February 16, 2018

WiFi Password: JeffersonBankTrust

7:30 – 8:20	REGISTRATION
8:20 – 8:30	Announcements Dana A. Gorelik, San Antonio Vice President, Fiduciary Advisory Specialist WELLS FARGO PRIVATE BANK
8:30 – 9:20 (50 minutes) (25 minutes ethics)	FRIDAY BREAKFAST Keynote Speaker Underwriter – FROST BANK Morals from the Courthouse: A Study of Recent Texas Cases Impacting the Wills, Probate, and Trust Practice Gerry W. Beyer, Lubbock GOVERNOR PRESTON E. SMITH REGENTS PROFESSOR OF LAW TEXAS TECH UNIVERSITY SCHOOL OF LAW
9:20 – 10:00 (40 minutes)	Child Support in Estate Administration and Guardianships Stephanie J. Bandoski, San Antonio BANDOSKE, BUTLER & REUTER, PLLC Amelia M. Edelman, San Antonio ATTORNEY AT LAW
10:00 – 10:20	MORNING BREAK Underwriter – LANGLEY & BANACK, INCORPORATED
10:20 – 11:10 (50 minutes)	Tracing Separate & Community Property Assets – It's Not Just For Divorce Court Anymore! Kim Ford, San Antonio theKFORDgroup
11:10 – 12:00 (50 minutes) (25 minutes ethics)	Guardianship Litigation Review James M. McNeel, San Antonio STRASBURGER & PRICE, LLP
12:00 – 1:30 (60 minutes) (25 minutes ethics)	LUNCH Underwriter – WELLS FARGO PRIVATE BANK Common Trust and Estate Issues Encountered by Wealth Planners Lisa Bianculli Hutter, Managing Director & Senior Director of Planning WELLS FARGO PRIVATE BANK/SOUTHWEST REGION Jillian Owens Seifert, Vice President & Senior Wealth Planner WELLS FARGO PRIVATE BANK/SOUTHWEST REGION
1:30 – 2:20 (50 minutes) (25 minutes ethics)	Initial Client Meeting for Guardianships Honorable Kelly M. Cross, San Antonio STATUTORY PROBATE JUDGE, COURT NO. 1, BEXAR COUNTY, TEXAS
2:20 – 3:00 (40 minutes) (20 minutes)	Duties of Attorneys and Guardians Ad Litem in Guardianship Proceedings in Texas Courts Karen Hogan, San Antonio LAW OFFICE OF KAREN HOGAN
3:00 – 3:20	AFTERNOON BREAK Underwriter – THE TRUST COMPANY
3:20 – 4:30 (70 minutes)	Aging Dementia and Capacity: A Physician's Perspective Martha E. Leatherman, M.D., San Antonio
4:30	Adjourn

REGISTRATION & FEES

\$450 if Registration is received by January 31, 2018

\$500 if Registration is received after January 31, 2018

Registration Fee MUST Accompany Registration Form

Name: _____

Company/Firm: _____

Address: _____

E-mail: _____

Occupation: _____

I am paying by:

Check (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:

PDF download, if possible Hard copy binders

I am unable to attend. For \$250, I would like the course materials to be sent to me by:

PDF download, if possible Hard copy binders

REGISTRATION FORM AND FEES TO BE RETURNED AS FOLLOWS:

Patty Vargas
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