

Friday, February 12, 2016

Wi-Fi Password: theKFORDgroup

7:45 – 8:30 Friday Breakfast  
Underwriter – **FROST BANK**

8:30 – 9:15 **Transfer on Death Deed**  
Stephen A. Bressler, *San Antonio*  
DUNCAN, BRESSLER & LIU, INC.

9:15 – 10:00 **A Conflicts Analysis of the Estate Plan**  
David B. West, *San Antonio*  
DYKEMA COX SMITH

10:00 – 10:15 Morning Break  
Underwriter – **LANGLEY & BANACK, INCORPORATED**

10:15 – 11:00 **Will and Trust Modifications**  
Christopher T. Hodge, *San Antonio*  
LANGLEY & BANACK, INCORPORATED

11:00 – 11:45 **Sex, Drugs & Rock-n-Roll: 2016 Top 10 Elder Law Issues for our Boomer-Clients**  
Patricia Flora Sitchler, *La Vernia*  
LAW OFFICE OF PATRICIA FLORA SITCHLER

11:45 – 12:45 Lunch  
Underwriter – **WELLS FARGO BANK**

**Case Law Update**  
Hon. Sandee Bryan Marion, *San Antonio*  
CHIEF JUSTICE, FOURTH COURT OF APPEALS, STATE OF TEXAS

GUARDIANSHIP BREAKOUT SESSION

1:00 – 1:50 **Aunt Minnie Needs Help:  
Guardianship v. Mental Health Treatment v. Estate Planning**  
Judge Polly Jackson Spencer, *San Antonio*  
SENIOR STATUTORY PROBATE JUDGE

1:50 – 2:40 **Changes to Application for Guardianship and Findings Required by the Court**  
Judge Kelly M. Cross, *San Antonio*  
STATUTORY PROBATE JUDGE, COURT NO. 1, BEXAR COUNTY, TEXAS

2:40 – 2:55 Afternoon Break  
Underwriter – **DUNCAN, BRESSLER & LIU, INC.**

2:55 – 3:40 **2015 Guardianship Legislative Update**  
Amy E. Bitter, *Castroville*  
AMY E. BITTER, P.C.

- 3:40 – 4:25    **Determination of Incapacity – Physician Examination**  
Jason E. Schillerstrom, M.D., *San Antonio*  
UT HEALTH SCIENCE CENTER SAN ANTONIO – SCHOOL OF MEDICINE, PSYCHIATRY
- 4:25 – 5:15    **New Rules, New Roles: The Ad Litem’s Duties in Guardianships**  
Carol Bertsch, *San Antonio*  
THE LAW OFFICES OF CAROL BERTSCH
- 5:15            **Adjourn**

ADVANCED ESTATE PLANNING BREAKOUT SESSION

- 1:00 – 1:45    **Navigating the Post-ATRA Universe (and Documenting the Flight Plan)**  
Charles A. Granstaff, *San Antonio*  
GRANSTAFF, GAEDKE AND EDGMON, P.C.
- 1:45 – 2:30    **Practical Income Tax Gems for Estate Planning Professionals**  
Jason R. Flaherty, *Austin*  
BRINK BENNETT FLAHERTY, PLLC
- 2:30 – 2:45    Afternoon Break  
Underwriter – **DUNCAN, BRESSLER & LIU, INC.**
- 2:45 – 3:30    **Tax Considerations and Updates for Preparing Complete Gift Tax Returns**  
Patricia Quintana-Perron, *San Antonio*  
BKD, LLP
- 3:30 – 4:15    **Generation-Skipping Transfer Tax**  
C. Christine Borrett, *Houston*  
OAKS, HARTLINE & DALY, LLP
- 4:15 – 5:00    **Practical and Ethical Considerations  
Arising from Attorney Service on Nonprofit Boards**  
Katherine E. (“Katy”) David, *San Antonio*  
STRASBURGER & PRICE, LLP
- 5:00            **Adjourn**