

**Friday, February 4, 2022**

**WiFi Password: theKFORDgroup**

**7:30 – 8:20**      **REGISTRATION**

**8:20 – 8:30**      **Announcements**  
Patty Rouse Vargas, *San Antonio*  
DAVIS & SANTOS, PLLC

**FRIDAY BREAKFAST**  
Premier Underwriter – **JEFFERSON BANK TRUST**

**8:30 – 9:30**      **Guardianship Practice and Procedures**  
(1 hour)  
(1/2 hour ethics)      Judge Veronica Vasquez, *San Antonio*  
STATUTORY PROBATE JUDGE, BEXAR COUNTY, PROBATE COURT NO. 2

**9:30 – 10:20**      **Tax Changes and Traps**  
(1 hour)      Kim Ford, *San Antonio*  
THEKFORDGROUP

**10:20 – 10:40**      **MORNING BREAK**  
Sponsor – **LANGLEY & BANACK, INC.**

**10:40 – 11:10**      **Multi-Generation Planning in Today's Environment**  
(1/2 hour)      Michael Klein, *Kerrville*  
HAPPY TRUST COMPANY  
Matt Occhipinti, *San Antonio*  
NORTHWESTERN MUTUAL WEALTH MANAGEMENT COMPANY

**11:10 – 12:00**      **2021 Texas Estate, Probate, Guardianship**  
(1 hour)      **and Trust Legislative Update**  
(1/2 hour ethics)      Craig Hopper, *Austin*  
HOPPER MIKESKA, PLLC

**12:00 – 1:30**      **LUNCH**  
Premier Underwriter – **BROADWAY BANK WEALTH MANAGEMENT**

**12:00 – 1:30**      **Morals from the Courthouse: A Study of Recent Texas Cases**  
(1 hour)      **Impacting the Wills, Probate, and Trust Practice**  
(1/2 hour ethics)      Gerry W. Beyer, *Lubbock*  
GOVERNOR PRESTON E. SMITH REGENTS PROFESSOR OF LAW  
TEXAS TECH UNIVERSITY SCHOOL OF LAW

**Zoom Connection: Clark Hill Strasburger**  
**Power Provider: Regions Private Wealth Management**  
**UBS Drives and Lanyards: Exencial Wealth Advisors**  
**Charging Stations: Argent Trust Company**  
**Friday Beverage Sponsor: Wells Fargo Private Bank**

**1:30 – 2:20**  
(1 hour)  
(1 hour ethics)

**2021 Amendments to the Texas Disciplinary Rules of Professional Conduct**

Shawn P. Hughes, *San Antonio*  
BROADWAY BANK WEALTH MANAGEMENT  
Ellen E. Pitluk, *San Antonio*  
STATE BAR OF TEXAS

**2:20 – 3:20**  
(1 hour)  
(1/4 hours ethics)

**Practical Tips for Managing Cryptocurrencies and Digital Assets**

Erik Ahlenius, *San Antonio*  
JEFFERSON BANK TRUST

**A Fiduciary's Duty Regarding Cryptocurrencies and Digital Assets**

David B. West, *San Antonio*  
CALDWELL EAST & FINLAYSON, PLLC

**3:20**

**Adjourn**

**Zoom Connection: Clark Hill Strasburger**  
**Power Provider: Regions Private Wealth Management**  
**UBS Drives and Lanyards: Exencial Wealth Advisors**  
**Charging Stations: Argent Trust Company**  
**Friday Beverage Sponsor: Wells Fargo Private Bank**