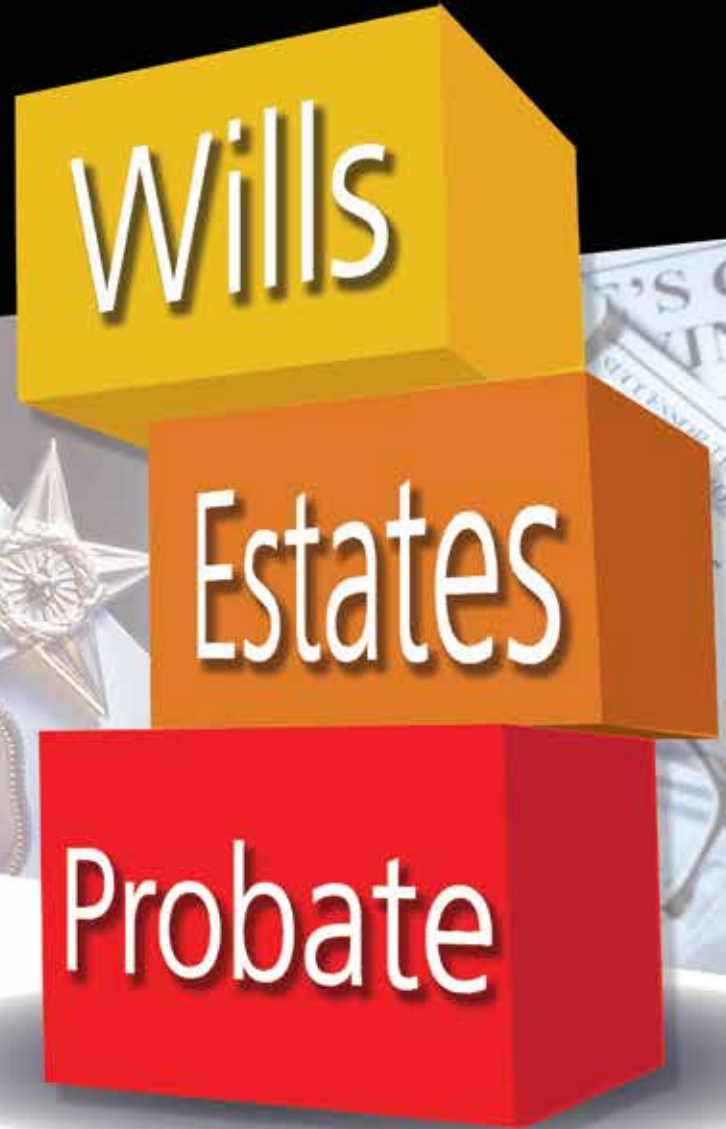


16TH ANNUAL

Building Blocks of Wills, Estates and Probate Course

Live Webcast | January 9

Watch from the comfort of your home or office.



VIA VIDEO REPLAY

DALLAS

February 13, 2015

FT. WORTH

February 27, 2015

HOUSTON

March 6, 2015

.....

WEBCAST REPLAY

March 13, 2015

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TexasBarCLE presents the 16th Annual

Building Blocks of Wills, Estates and Probate Course

Real Estate, Probate & Trust Law Section members can **save \$50!**

 #TBCLEwills

LIVE Webcast

January 9, 2015

Watch from your home or office computer via live webcast!

VIDEO Replays

DALLAS

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February 27, 2015

HOUSTON

March 6, 2015

Attorneys licensed 5 years or less can attend video replays for **half off!**

WEBCAST Replay

March 13, 2015

Watch from the comfort of your home or office.

MCLE CREDIT

6.75 HOURS (3.5 ETHICS)

MCLE COURSE NO: 901301689

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.

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.

The State Bar's continuing education sponsor I.D. number is 135.

Purpose and Scope

Whether you are a new lawyer or an experienced practitioner who is interested in transitioning your practice into the estate planning and probate area, this seminar will help you. The focus is on the basics of estate planning, probate, Medicaid and practice management. Attorneys who are experts in their field will discuss solutions to many of the legal issues and practical problems that attorneys who practice in this area encounter on daily basis. They will answer any questions you email in during the seminar. Valuable reference materials for your practice are included that will keep you up to date on the basics of estate planning, probate, Medicaid and practice management. I hope you will join us.



R. Hal Moorman

8:50 Welcoming Remarks Course Director

R. Hal Moorman, *Brenham*
Moorman Tate Haley Upchurch & Yates

9:00 Basic Estate Planning 1.5 hrs (.75 ethics)

- Fees
- Professional Liability to Clients and Others
- Wayward Clients
- Joint Representation
- Marital Property
- Simple Wills
- Trusts
- Ancillary Documents
- Coordinating Non-Probate Assets
- Life Insurance
- Retirement
- Annuities
- Rights of Survivorship
- Document Storage
- Evaluating the Client
- Digital Assets
- Artificial Reproduction
- DOMA

Moderator

Mickey R. Davis, *Houston*
Davis & Willms

R. Hal Moorman, *Brenham*
Moorman Tate Haley Upchurch & Yates

Marjorie J. Stephens, *Dallas*
Stephens & Guthrie

10:30 Break

10:45 Elder Law Planning and Issue Spotting 1.5 hrs (.75 ethics)

- Estate Planning for the Elderly and Disabled
- Public Benefits Programs
- Planning with Trusts
- Veterans Benefits Basics
- Recent Developments
- Medicaid
- Nursing Home Planning
- Affordable Care Act
- Impact of Special Needs Trusts

Moderator

Pi-Yi Mayo, *Baytown*
Law Offices of Pi-Yi Mayo

Molly Dear Abshire, *Bellaire*
Wright Abshire

Patricia F. Sitchler, *San Antonio*
Schoenbaum, Curphy & Scanlan

12:15 Break

12:30 Tools for Efficiently Developing Your Estate and Trusts Practice .75 hr (.5 ethics)

- Office/Staffing Options
- How Paperless Should You Be?
- PC or Mac?
- Smartphones and not-so-smart phones and Tablets
- What Software Do You Absolutely Have to Have?
- Document Production

- Cloud Computing: Ethical and Security Issues
- Timekeeping, Billing and Bookkeeping Options

Thomas C. Baird, *Temple*
Baird Crews Schiller & Whitaker

Steve Brischke, *Temple*
Baird Crews Schiller & Whitaker

1:15 **Break**

1:30 **Probate Procedures and Alternatives** 1.5 hrs (.75 ethics)

- Who Do You Represent?
- Probate Options: Procedures and Alternatives
- Intestacy Options and Procedures
- Administration Filing Requirements and Deadlines
- Preparing Inventories or Affidavits
- Independent and Dependent Administrations
- Lost Will Problems

Moderator

Tina R. Green, *Texarkana*
Capshaw Green

Claire D. East, *Austin*
Hopper Mikeska

Hon. Steve M. King, *Fort Worth*
Judge, Tarrant County Probate Court One

3:00 **Break**

3:15 **Administering the Estate** 1.5 hrs (.75 ethics)

- Duties and Powers of the Personal Representatives
- Notice and Filing Requirements
- Addressing Creditor Issues and Claims
- Spousal Issues and Rights
- Beneficiary Issues and Rights
- Defending and Removing an Executor or Administrator
- Accountings, Releases and Discharges
- Partial and Final Distributions

Moderator

Sarah Patel Pacheco, *Houston*
Crain, Caton & James

Omar J. Leal, *Corpus Christi*
Branscomb

Pamela Orsak, *Victoria*
The Law Office of Pamela D. Orsak

4:45 **Adjourn**

Webcast Registration (Online Only)

How to Register for the January 9 or March 13 Webcast

Webcast registration is only available online and by using a credit card. Go to TexasBarCLE.com and click on Webcasts. Then under the listing for **Building Blocks of Wills, Estates and Probate**, click **Register** for Webcast. Registration by mail, fax or phone will not be accepted.

Webcast Registration Fee and Course Material

The fee is \$245 per webcast registrant. Course materials are included as PDFs for viewing, downloading, or printing during and after the webcast. A hardcopy version may be purchased separately using this brochure's registration form.

Claiming MCLE Credit

For the webcast, the MCLE number will be provided to you online at the conclusion of your viewing, along with instructions on how to claim your MCLE credit while still online.

Replaying the Webcast on Your Computer

About a week after the webcast, webcast registrants will have 9-12 months to finish viewing or reviewing the program online.

IMPORTANT: Registration for this webcast admits only the registrant. Registrants are expressly prohibited from allowing non-registrants access to the program.

For group viewings of a webcast, contact Firm & Group Sales Manager Laura Angle at 512-250-5575 or langle@texasbar.com.

Course Director

R. Hal Moorman Brenham

Planning Committee

Mickey R. Davis Houston
Tina R. Green Texarkana
Pi-Yi Mayo Baytown
Sarah Patel Pacheco Houston

TexasBarCLE Planning Team

Kandi Botello Program Planner
Jillison Hicks Program Coordinator
Sheena Taylor Written Materials Coord.
Denise Steusloff Meeting Services Coord.

Real Estate, Probate & Trust Law Section of the State Bar of Texas

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Michelle E. Hunter Executive Director
Patrick A. Nester Director, TexasBarCLE

State Bar Video Replays

YOU CAN PRE-REGISTER FOR THESE 3 SITES.
USE THE REGISTRATION FORM ON PAGE 5.

Dallas February 13, 2015

Cityplace Events
2711 N. Haskell Ave.
Dallas, TX 75204
214-515-5100
www.cityplaceevents.com

Self parking is complimentary in the Cityplace parking garage with staff validation.

Fort Worth February 27, 2015

Norris Conference Center
304 Houston St.
Fort Worth, TX 76102
817-289-2400
www.norriscenters.com/FortWorth

Parking is complimentary in all Sundance Square Parking Lots & Garages with NCC-FW validation.

Houston March 6, 2015

Crowne Plaza River Oaks Hotel
2712 Southwest Freeway
Houston, TX 77098
713-523-8448
www.crowneplaza.com

Self parking is complimentary in the Crown Plaza parking garage with staff validation.

Local Bar Video Replays*

FOR ONE OF THE SHOWINGS BELOW, REGISTER AT THE DOOR.
(Discounts do not apply.)

Amarillo February 13

Eagle Center Basement Training Room
112 West 8th Ave. (zip: 79101)
Contact Jo Ann Holt: 806-371-7226
director@amarillobar.org
www.amarillobar.org
Sponsor: Amarillo Area Bar Association

Arlington February 13

Law Office of Roger "Rocky" Walton
2310 W. Interstate 20, Suite 200
(zip: 76017)
Contact Roger "Rocky" Walton:
817-429-4299
rwalton@rockywalton.com
Sponsor: Arlington Bar Association

Athens February 13

Athens Country Club
500 Park Drive (zip: 78504)
Contact Donna Bennett: 903-670-2668
dbennett@tvcc.edu
Sponsor: Henderson County Bar Association

Austin February 13

Texas Law Center
1414 Colorado, 1st Floor (zip: 78701)
Contact DVD CLE: 800-204-2222, Ext. 1575
ptrevino@texasbar.com
Sponsor: DVD CLE
Validated parking at 400 West 15th; enter on the right at 16th & Guadalupe. Bring your ticket to the Law Center for validation.

Bay City February 13

130th District Courtroom
1700 7th Street, 3rd Floor (zip: 77414)
Contact: Denise Fortenberry: 979-244-7645
attorney@co.matagorda.tx.us
Sponsor: Matagorda County Bar Association

Corpus Christi TBA

Contact Dick King: 361-883-4022
dking@corpusbar.com
Sponsor: Corpus Christi Bar Association

Corsicana February 13

Corsicana Country Club
5000 Emhouse Road (zip: 75110)
Contact DeeDee Rood: 903-872-4244
deedee@keathleykeathley.com
Sponsor: Navarro County Bar Association

Hondo February 13

Hermann Sons Steakhouse
577 Hwy. 90 E. (zip: 78861)
Contact John Ashley Chunn: 830-426-3911
jac@johnchunnlaw.com
Sponsor: Medina County Bar Association

Huntsville February 13

The Sam Houston Memorial Museum
W.S. Gibbs Conference Hall
1402 19th Street (zip: 77340)
Contact Gene Roberts: 936-294-1717
gene.roberts@shsu.edu
Sponsor: Walker County Bar Association

Katy February 13

Willow Fork Country Club
21055 Westheimer Parkway (zip: 77450)
Contact Sarah Springer: 281-646-0644
sarah@sarahspringerlaw.com
Sponsor: Katy Bar Association

La Grange February 13

Fayette County AG Bldg., Main Meeting Room
255 Svoboda Lane (zip: 78945)
Contact Harold Streicher: 979-968-1801
harold.streicher@co.fayette.tx.us
Sponsor: Fayette County Bar Association

Lubbock February 13

916 Main St., 2nd Floor Auditorium
(zip: 79401)
Contact Lisa Harden: 806-775-1389
info@lubbockareabar.org
Sponsor: Lubbock Area Bar Association

McAllen February 13

Plains Capital Bank (2nd Floor Board Room)
7201 N. 10th Street (zip: 78504)
Contact CJ Sanchez: 956-380-1691
cj@hidalgobar.org
Sponsor: Hidalgo County Bar Association

Nacogdoches February 13

412 N. Street, Suite H (zip: 75961)
Contact Albert Weatherly: 936-564-5142
aweatherly@sbcglobal.net
Sponsor: Nacogdoches County Bar Association

Tyler February 27

Tyler Area Chamber of Commerce,
Genecov Room
315 N. Broadway Ave. (zip: 75702)
Contact Cristy Arscott: 903-526-2700
cristy@smithcountybar.com
Sponsor: Smith County Bar Association



* Registrants for local bar video replays do not qualify for the "FREE TO OUR REGISTRANTS" benefits mentioned on p. 6.

Online

TexasBarCLE.com
credit card only

Phone

800-204-2222, x1574
during business hours
credit card only

Fax

512-427-4443
credit card only

Mail

State Bar of Texas
LB# 972298
P.O. Box 972298
Dallas, TX 75397-2298
check or credit card

Registering

five or more?
E-mail Laura Angle at
laura.angle@texasbar.com
for group discount
information.

REPTL Section Members
Save \$50!

Building Blocks of Wills, Estates and Probate Course

5110

1

State Bar Video Replays 5110

You may pre-register for the video sites listed below. For all other video replays, register at the door.

DALLAS, February 13, Cityplace Events

- Regular Registrant \$275
- Licensed 5 years or less, **HALF OFF** \$137.50*

FORT WORTH, February 27, Norris Conference Center

- Regular Registrant \$275
- Licensed 5 years or less, **HALF OFF** \$137.50*

HOUSTON, March 6, Crowne Plaza River Oaks

- Regular Registrant \$275
- Licensed 5 years or less, **HALF OFF** \$137.50*

*No discounts in section 3 may be taken

I may attend complimentary because I am a (see p. 6):

- Qualifying judge
- Judge's staff attorney

State Bar video replay registration includes a working lunch, complimentary internet, and complimentary parking.

Local Bar Video Replays

For additional video replays (sponsored by local bar associations) see page 4 for location and registration information.

2

I want my course materials format to be:

- Hard copy books as well as a PDF download of same (both formats included in registration fee)
- PDF download ONLY so I'll **take \$25 OFF**

3

I'm entitled to 1 or 2 discounts on the course:

\$50 OFF because (choose 1 box only) I'm a member of the

- Real Estate, Probate & Trust Law Section (\$25 of it provided by REPTL)

\$25 OFF because (choose 1 box only) I'm a member of the

- State Bar College
- Paralegal Division

4

I can't attend. Just send course materials.

FREE Shipping & Handling

- Course book \$155 (plus tax; see footnote[†])

To order a discounted PDF download of course materials (available 4-6 weeks after the course), search **Publications** at TexasBarCLE.com.

5

My total is \$ _____ . I am paying by:

- Check (enclosed) payable to the State Bar of Texas for \$ _____
- Visa MasterCard AMEX Discover

PLEASE PRINT LEGIBLY Account No. _____ Exp. Date _____

Name on card (Please print) _____

Signature _____

State Bar Membership No. _____

Registrant Name _____

Firm Name/Court _____

Address for Bar-Related Mail _____

City/State _____ Zip _____

Phone () _____ Fax () _____

E-Mail (required for registrant's PDF download option): _____

A confirmation of your registration will be sent to the e-mail address you provide.

[†]Plus 8.25% sales tax on total. Please include sales tax or attach an exemption certificate. Book orders are filled and shipped 4-6 weeks after the live program. A bill will be sent unless a credit card charge is authorized on this form.

For information on audio CDs of course topics, contact our DVD CLE service at 800-204-2222, x1575. MP3 files of topics will be downloadable from TexasBarCLE.com 6-8 weeks after the course.

QUESTIONS?

800-204-2222, x1574 • 512-427-1574

Building Blocks of Wills, Estates and Probate Course

Live Webcast | January 9 See inside for video replays.

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► TexasBarCLE.com



Ways to Save on This Course!

Real Estate, Probate & Trust Law Section Members Can Save \$50

Not a member? To join, e-mail sections@texasbar.com or phone 800-204-2222, x1425. Please do not send Section membership payment with your registration fee.

Earn Discounts by Registering Five or More from your firm or agency. Contact Firm & Group Sales Manager Laura Angle at 512-250-5575 or laura.angle@texasbar.com.

HALF OFF for Attorneys Licensed 5 Years or Less! You read that right! See the registration form.

Need Financial Assistance to Attend?

TexasBarCLE offers a limited number of scholarships to attend a live course, video replay, archived online class, or webcast, or to subscribe to our Online Library. To apply or to learn more, call Mon-Fri 8am-5pm CT to Sara at 800-204-2222, x1490. Please apply at least four weeks prior to the CLE event.

Active State, County, and Texas-Area Federal Judges, Administrative Law Judges, Hearing Examiners, and Judge's Staff Attorneys May Attend for Free, Provided:

(1) the course directly relates to the judge's tribunal's jurisdiction, (2) the judge is a full-time judge or retired under a judicial retirement system and (3) space is available for all paying registrants. This privilege does not extend to prosecutors, receivers, trustees, other court staff, or persons serving part-time in a judicial capacity. Actual attendance is required to receive course materials.

Parking Information for Video Replays

Dallas: Self-parking is complimentary in the Cityplace Events parking garage with staff validation.

Ft. Worth: Parking is complimentary in all Sundance Square Parking Lots & Garages. Simply bring your ticket to the reception desk at NCC-FW for validation.

Houston: Self-parking is complimentary in the Crowne Plaza parking garage with staff validation.

If You Need Special Accommodations to Attend, please contact us as soon as possible at 800-204-2222, x1748. For Cityplace Events in Dallas, please call us in advance of your arrival so that assisted parking can be arranged for drivers of handicap-designated vehicles.

Registered But Can't Attend? Still Earn MCLE Credit and receive course materials by (1) calling 800-204-2222, x1574 to transfer your registration to a later presentation or (2) taking the course online later, in which case you'll automatically be sent the course materials. If you wish a refund instead, mail or fax (512-427-4443) your request so that we receive it at least one business day before the program.

FREE TO OUR REGISTRANTS!

Online Videos and MP3s of the Topics

will be available to registrants of the live webcast and the Dallas, Ft. Worth, and Houston video replays 6-8 weeks after the course. (Registrants of the local bar video replays listed on p. 4 do not qualify for these free online benefits.) Provide your e-mail address when preregistering to be notified when and how these benefits may be accessed. (Note: Presentation lengths may vary from that which was advertised.) There's no extra charge; as a registrant, you're already entitled!

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.