

Whether you are planning to obtain your first guardian ad litem certification or need to become re-certified, South Texas College of Law's 2010 Guardian and Ad Litem Certification program offers strong foundational topics as well as presentations designed to provide practical tips for dealing with aging clients. Attendees will obtain the necessary tools to initiate, administer, modify, and close guardianships, and will also learn about the differences in their duties as a guardian ad litem versus their duties as an attorney ad litem. New for this year, the program begins with a luncheon presentation on aging which is immediately followed by a discussion on elder abuse and the resultant attorney ethical duties that arise.

Notaries public will be available at the conclusion of the 5.25-hour program (including 2.0 hours of legal ethics) so attendees will have everything they need to submit a notarized affidavit for certification to the State Bar of Texas the same day.

GUARDIAN AND AD LITEM CERTIFICATION COURSE

September 22, 2010

Accredited by the State Bar of Texas for
5.25 MCLE Hours, 2.0 Ethics Hours

South Texas College of Law's 2010 Wills & Probate Institute is truly a "can't miss" event. This year's Planning Committee has included a wide variety of topics focused on providing attendees with practical tips and techniques they can immediately apply in their own practices. Topics include the annual case law update, numerous sessions on planning (retirement, incapacity, estate, and post-mortem), and several litigation-related topics including a session on discovery tools, alternatives to probate, the most commonly made errors in litigation, and a mock direct exam. Thursday's luncheon topic covers the future of estate planning and administration and Friday's topic is all about making a graceful exit from a lawyer's own practice.

Join your colleagues for a packed agenda offering 13.75 MCLE hours, including 1.75 hours of legal ethics.

25th Annual WILLS and PROBATE INSTITUTE

September 23-24, 2010

South Texas College of Law
1303 San Jacinto
Garrett-Townes Hall
Houston, Texas

Accredited by the State Bar of Texas for
13.75 MCLE Hours, 1.75 Ethics Hours

**GUARDIAN and AD LITEM
CERTIFICATION COURSE**

Wednesday, September 22, 2010

- 10:30 **Registration and Lunch** (pick up lunch and proceed to the auditorium)
- 11:20 **Welcome and Opening Remarks**
- Helen B. Jenkins, *Vice President and Associate Dean, South Texas College of Law*
 - Lisa L. Dahm, J.D., LL.M.-Health, *Director of CLE and Adjunct Professor, South Texas College of Law*
- Moderator: Hon. R. Rory Olsen, Harris County Probate Court No. 3**
- 11:30 **Lunch Presentation**
The Aging Process (.75 hour)
- Carmel B. Dyer, M.D., *UT Physician's Center for Aging Bellaire*
- 12:15 **After Lunch Break**
- 12:30 **Elder Abuse and Exploitation: Ethical Duties for Attorneys**
(Includes .50 hour of legal ethics) (.50 hour)
- Hon. Georgia H. Akers, *Associate Judge, Harris County Probate Court No. 3 Houston*
- 1:00 **Initiating a Guardianship**
(Includes .25 hour of legal ethics) (.50 hour)
- Fatima Breland, *The Breland Law Firm Houston*
- 1:30 **Duties of Attorney and Guardian Ad Litem**
(Includes .50 hour of legal ethics) (1.0 hour)
- Denyse Ward, *Attorney at Law Houston*
- 2:30 **Afternoon Break**
- 2:45 **Guardianship Administration: Practical Tips about People, Property, and Family**
(Includes .50 hour of legal ethics) (1.0 hour)
- Jerry Simoneaux, *Staff Attorney and Guardianship Coordinator, Harris County Probate Court No. 1 Houston*
 - Catherine N. Wylie, *Wylie Law Firm Houston*
- 3:45 **Restoring Wards**
(Includes .25 hour of legal ethics) (.50 hour)
- Karen A. Blomstrom, *Law Office of Karen A. Blomstrom Crosby*
- 4:15 **Guardianship Case Law Update** (.50 hour)
- Linda C. Goehrs, *Horrigan & Goehrs, L.L.P. Houston*
- 4:45 **Guardianship of the Estate Only: The Secrets Revealed** (.50 hour)
- W. Kevin Alter, *Hebinck & Alter, P.C. Houston*
- 5:15 **Adjourn**

Total MCLE Hours for Wednesday: 5.25 hours, 2.0 hours of legal ethics

**25th Annual
WILLS and PROBATE
INSTITUTE**

Thursday, September 23, 2010

- 7:30 **Registration and Continental Breakfast sponsored by Encore Trust, a division of Encore Bank**
- 8:35 **Welcome and Opening Remarks**
- Helen B. Jenkins, *Vice President and Associate Dean, South Texas College of Law*
 - Lisa L. Dahm, J.D., LL.M.-Health, *Director of CLE and Adjunct Professor, South Texas College of Law*
- Morning Moderator:
Hon. Cathy Shannon, Associate Judge, Harris County Probate Court No. 4**
- 8:45 **Practical Post-Mortem Planning** (.75 hour)
- Paul D. Strug, *Weycer, Kaplan, Pulaski & Zuber, P.C. Houston*
 - Olivia Carbajal, *Weycer, Kaplan, Pulaski & Zuber, P.C. Houston*
- 9:30 **Twilight Planning: Using Advanced Techniques to Plan for Incapacity** (.75 hours)
- Amanda Gyeszly, *Fizer Beck Webster Bentley & Scroggins Houston*
- 10:15 **Advising Fiduciary Clients** (.50 hour)
- Bernard E. "Barney" Jones, *Attorney at Law Houston*
- 10:45 **Morning Break**
- 11:00 **The Guardianship of Loyce Juanita Parker: The Case for Adoption of UAGGPJA in Texas** (1.0 hour)
- Steve Fields, *Tarrant County Probate Court No. 2 Fort Worth*
 - Terry Hammond, *Terry W. Hammond & Associates El Paso*
- 12:00 **Lunch Break** (pick up lunch and return to the auditorium)
- 12:15 **Lunch Presentation**
2010 and Beyond: Estate Planning and Administration Issues (1.25 hours)
- Mickey R. Davis, *Bracerwell & Giuliani LLP Houston*
 - Jerry M. Scroggins, Jr., *Fizer Beck Webster Bentley & Scroggins Houston*
 - Melissa J. Willms, *Attorney at Law Houston*
- 1:30 **After Lunch Break**
- Afternoon Moderator:
Hon. Mike Wood, Harris County Probate Court No. 2**
- 1:45 **The Latest on IRAs, including Roths** (.50 hour)
- Diane V. Perrin, *Farner & Perrin, LLP Houston*
- 2:15 **Estate Planning Gems** (.75 hour)
- Cheryl C. Crabbe, *Winstead PC Houston*
- 3:00 **Medicaid Update** (.50 hour)
- Molly Dear Abshire, *Wright Abshire, Attorneys Bellaire*
- 3:30 **Afternoon Break**
- 3:45 **Homestead, Family Allowance, and Rights and Liabilities of the Surviving Spouse** (.75 hour)
- Tama Brooks Klosek, *Klosek Howes LLP Houston*
- 4:30 **A Musical Journey through Creditor Claims** (.75 hour)
- Gus G. Tamborello, *Gus G. Tamborello, P.C. Houston*
- 5:15 **Adjourn**

Total MCLE Hours for Thursday: 7.50 hours, no legal ethics

South Texas College of Law

Friday, September 24, 2010

- 8:00 **Continental Breakfast sponsored by Encore Trust, a division of Encore Bank**
- 8:50 **Welcome Remarks**
 - Lisa L. Dahm, J.D., LL.M-Health, *Director of CLE and Adjunct Professor, South Texas College of Law*
- Morning Moderator:**
Hon. Kathleen S. Stone, Harris County Probate Court No. 1
- 9:00 **Estate Administration from A to Z**(.50 hour)
 - Sarah Patel Pacheco, *Crain, Caton & James P.C. Houston*
- 9:30 **Alternatives to Probate**(.75 hour)
 - Hon Kathleen S. Stone, *Harris County Probate Court No. 1 Houston*
- 10:15 **Morning Break**
- 10:30 **Probate and Non-Probate Dispositions of Community Property**(.75 hour)
 - Professor Thomas M. Featherston, Jr., *Mills Cox Professor of Law, Baylor University School of Law Waco*
- 11:15 **Ten Issues to Consider Before Filing an Application to Probate a Will**
(Includes .25 hour of legal ethics)(1.0 hour)
 - Mary S. Galligan, *Law Offices of Galligan & Manning Houston*
- 12:15 **Lunch Break** (pick up lunch and return to the auditorium)
- 12:30 **Lunch Presentation**
Lawyer Retirement: Making a Graceful Exit
(Includes 1.0 hour of legal ethics) (1.0 hour)
 - Ann D. Foster, *State Bar of Texas Austin*

- 1:30 **After Lunch Break**
- Afternoon Moderator:**
Hon. William McCulloch, Harris County Probate Court No. 4
- 1:45 **Case Law Update**(1.0 hour)
 - Professor Gerry W. Beyer, *Governor Preston E. Smith Regents Professor of Law, Texas Tech University School of Law Lubbock*
- 2:45 **Afternoon Break**
- 3:00 **Discovery Toolbox**
(Includes .25 hour of legal ethics)(.50 hour)
 - Suzanne E. Goss, *Campbell Harrison & Dagley LLP Houston*
- 3:30 **Mock Direct Exam**
(Includes .25 hour of legal ethics)(.75 hour)
 - Jimmy Walker, *Dinkins Kelly Lenox Lamb & Walker, L.L.P. Houston*
 - Jill W. Young, *MacIntyre & McCulloch, LLP Houston*
- 4:15 **Adjourn**

Total MCLE Hours for Friday: 6.25 hours, 1.75 hours of legal ethics

Registration Form

Guardian and Ad Litem Certification Course, September 22, 2010 25th Annual Wills and Probate Institute, September 23-24, 2010

South Texas College of Law

1 Tuition for Wills and Probate Institute

- \$445 for Attorneys (\$535 including the Guardian and Ad Litem Certification Course)
- \$335 for Paralegals and Legal Assistants
- \$155 for Attorneys attending the Guardian and Ad Litem Certification Course only

I am unable to attend. Please ship me the course manual.
 \$145 Course Manual for the Wills and Probate Institute Only - Hardcopy only
(includes shipping and handling).
 Allow three weeks for delivery.

2

Name: Mr. Ms. _____ Bar Card No. : _____

Firm/Agency Name: _____

Address: _____ City: _____ State: _____ Zip: _____

Telephone: _____ Fax: _____ Email: _____

I would like to receive e-mail notifications about upcoming CLE courses.

3

American Express Master Card Visa

Card No.: _____ Exp. Date: _____

Signature: _____

Check enclosed (*Payable to South Texas College of Law*) Check No. _____ Amount _____

To Register

MAIL South Texas College of Law
CLE Department
1303 San Jacinto, Suite 1115
Houston, TX 77002-7006

ONLINE (Credit card only) www.stcl.edu/cle/cle.html

PHONE (Credit card only) (713) 646-1757 or (800) 646-1253

FAX (Credit card only) (713) 646-1780

REGISTRATION

Tuition includes breakfast, lunch, refreshments and course manual. No written confirmations will be sent. Allow one week to process. Confirm your registration at www.stcl.edu/cle/registrationconfirmation.html.

REFUND POLICY

Refunds, less a \$45.00 processing fee, will be given to those who cancel in writing by 5:00 p.m., Tuesday, September 21, 2010. No refunds will be granted thereafter.

ACCREDITATIONS

Guardian and Ad Litem Certification Course

Accredited by the State Bar of Texas for 5.25 MCLE Hours, including 2.0 Legal Ethics Hours.

Accredited by the Texas Board of Legal Specialization in Civil Trial Law and Estate Planning and Probate Law.

25th Annual Wills and Probate Institute

Accredited by the State Bar of Texas for 13.75 MCLE Hours, including 1.75 Legal Ethics Hours.

Accredited by the Texas Board of Legal Specialization in Estate Planning and Probate Law and Tax Law.

SCHOLARSHIPS

Limited, partial tuition scholarships are available for attorneys with government agencies and nonprofit organizations. Direct written requests to Lisa L. Dahm, Director of CLE.

JUDGES

Full-time active Texas court judges and associate judges may attend for a reduced tuition of \$75. Attendance is required. Call Kimberly Smith for more information at (713) 646-1757 or (800) 646-1253.

HOTEL - \$139 per night. **Guaranteed until September 7, 2010.**

Crowne Plaza Houston - Downtown, 1700 Smith Street
Book online at www.cp downtown.com or call (877) 834-3613

Located a short distance from the law school. Complimentary Local Area Shuttle available upon request throughout the Downtown area. Available 7:00 a.m. - 10:45 p.m., 7 days a week. Overnight parking rate \$12 per night.

PARKING

Fannin Garage, 1112 Clay Street, \$6.00 per day (Early Bird Special: Enter by 9:00 a.m. and pay only \$4.00). Reserved parking for the disabled on floors 5, 7, 9 and 11 near the elevator.

Additional parking available in garages and on surface lots near the law school.

SPECIAL ACCOMMODATIONS

For any special needs as addressed in the Americans with Disabilities Act, call Kimberly Smith at (713) 646-1757 or (800) 646-1253 by August 23, 2010 or as soon thereafter as possible.

Planning Committee

Jeannine C. Flynn, Chair
Attorney at Law

Cheryl C. Crabbe
Winstead PC

Douglas A. Edwards
Horrigan & Goehrs, L.L.P.

Linda C. Goehrs
Horrigan & Goehrs, L.L.P.

Pamela E. Powell
Cenatiempo & Ditta, L.L.P.

Weldon Russell
Locke Lord Bissell & Liddell LLP

Hon. Cathy Shannon
Associate Judge
Harris County Probate Court No. 4

Jerry Simoneaux
Staff Attorney and
Guardianship Coordinator
Harris County Probate Court No. 1

Paul D. Strug
Weycer, Kaplan, Pulaski & Zuber, P.C.

Jimmy Walker
Dinkins Kelly Lenox Lamb & Walker, L.L.P.

Denyse Ward
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Catherine N. Wylie
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