

Guardian and Ad Litem Certification Course

September 23, 2009

Accredited by the State Bar of Texas for
4.5 MCLE Hours, 1.25 Ethics Hours

Whether you are planning to obtain your first guardian ad litem certification or need to become re-certified, South Texas College of Law's 2009 Guardian and Ad Litem Certification program offers strong foundational topics and some emerging issues of interest. Attendees will obtain the necessary tools to initiate, administer, modify, and close guardianships. Attendees will also learn about the differences in their duties as a guardian ad litem versus their duties as an attorney ad litem, and will pick up practical tips for dealing with wards and handling capacity and representation issues.

Notaries public will be available at the conclusion of the 4.5-hour program (including 1.25 hours of legal ethics) so attendees will have everything needed to submit a notarized affidavit for certification to the State Bar of Texas the same day.

Today's troubled economic climate impacts not only our everyday lives, but is predicted to have a potentially devastating effect on the lives of our heirs and beneficiaries as well. Understanding recent changes to Texas' laws and regulations, and the interpretation of those changes by our Texas courts is critical. South Texas College of Law's 2009 Wills & Probate Institute is truly a "can't miss" event.

This year's Planning Committee has included a wide variety of topics – including legislative and case law updates, Medicaid, and the coordination of beneficiary designations as well as succession and estate planning techniques. The program includes a primer for fiduciaries and presentations designed to provide tips that attendees can apply in their practices. One interesting topic will address posthumous reproduction and surrogacy using this topic as one example of the impact that science has on the law.

Join your colleagues for a packed agenda offering 13.0 MCLE hours, including 2.5 hours of legal ethics.

24th Annual WILLS AND PROBATE INSTITUTE

September 24-25, 2009

Accredited by the State Bar of Texas for
13.0 MCLE Hours; 2.5 Ethics Hours

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

South Texas College of Law is an accredited sponsor approved by the State Bar of Texas Committee on MCLE

Accredited by the State Bar of Texas for up to
17.5 MCLE Hours, 3.75 Ethics Hours

GUARDIAN AND AD LITEM CERTIFICATION COURSE

Wednesday, September 23, 2009

- 11:15 **Registration and Check-in**
(Pick up lunch and proceed to auditorium)
- 12:25 **Welcome and Opening Remarks**
• Lisa L. Dahm, J.D., LL.M-Health, *Director of CLE and Adjunct Professor, South Texas College of Law*
- 12:30 **Hot Guardianship Topics (.50 hour)**
• Linda C. Goehrs, *Horrigan & Goehrs, L.L.P. Houston*
- 1:00 **What is Capacity? (.75 hour)**
• Dr. Mark E. Kunik, M.P.H., *Michael E. DeBakey VA Medical Center Houston*
- 1:45 **Initiating a Guardianship (.75 hour)**
(Includes .25 hour of legal ethics)
• Pamela E. Powell, *Cenatiempo & Ditta, L.L.P. Houston*
- 2:30 **Break**
- 2:45 **Administering a Guardianship (.75 hour)**
(Includes .25 hour of legal ethics)
• Catherine N. Wylie, *Wylie Law Firm Houston*
- 3:30 **Modifying Guardianships and Restoring Wards (.75 hour)**
(Includes .25 hour of legal ethics)
• Gus G. Tamborello, *Attorney/Mediator, Gus G. Tamborello, P.C. Houston*
- 4:15 **What Do You Do When The Proposed Ward Asks You To Represent Him/Her? (.50 hour)**
(Includes .25 hour of legal ethics)
• Karen A. Blomstrom, *Law Office of Karen A. Blomstrom Crosby*
- 4:45 **Duties of the Attorney Ad Litem (.50 hour)**
(Includes .25 hour of legal ethics)
• Jeannine C. Flynn, *Attorney at Law Houston*
- 5:15 **Adjourn**

Total MCLE Hours for Wednesday: 4.5 hours, 1.25 hours of legal ethics

- 12:45 **Lunch Presentation**
Ethics Fast Track (1.0 hour) (Ethics Topic)
• Hon. Kathleen S. Stone, *Harris County Probate Court No. 1 Houston*

1:45 **After Lunch Break**

Afternoon Moderator:

Hon. Kathleen S. Stone, Harris County Probate Court No. 1

- 2:00 **Inventories in Decedent's and Guardianship Estates (.75 hour)**
• Bridget O'Toole Purdie, *Bracewell & Giuliani LLP Houston*

2:45 **Coordinating Beneficiary Designations: Has Your World Changed in the Last Five Years? (.75 hour)**

• T. Christine Butts, *Riddle, Butts & Akiens, LLP Houston*

• Michael C. Riddle, *Riddle, Butts & Akiens, LLP Houston*

3:30 **Afternoon Break**

3:45 **Succession Planning for Family Businesses (.75 hour)**
(Includes .25 hour of legal ethics)

• Weldon Ray Russell, *Locke Lord Bissell & Liddell LLP Houston*

4:30 **A Primer for Trustees (.75 hour)**

• Helen B. Wils, *Crain, Caton & James, P.C. Houston*

5:15 **Adjourn**

Total MCLE Hours for Thursday: 7.25 hours, 1.75 hours of legal ethics

Friday, September 25, 2009

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. Ann Greene, Associate Judge, Probate Court No. 2

9:00 **Duties of the Attorney Ad Litem in Heirship Proceedings (.50 hour)**

• Louis M. Ditta, *Cenatiempo & Ditta, L.L.P. Houston*

9:30 **Dependent Administrations (.75 hour)**

• Hon. Cathy K. Shannon, *Associate Judge, Harris County Probate Court No. 4 Houston*

10:15 **Morning Break**

10:30 **VA Aid and Attendant Benefits - Planning Opportunity (.50 hour)**

• Christina Lesher, *Law Office of Christina Lesher, PC Houston*

11:00 **Dealing with the Debts of the Surviving Spouse in the Estate of the Deceased Spouse (.75 hour)**
(Includes .25 hour of legal ethics)

• Professor Thomas M. Featherston, Jr., *Baylor University School of Law Waco*

11:45 **Lunch Break** (pick up lunch and return to the auditorium)

12:00 **Lunch Presentation**

Thinking Outside the Box: Science and the Law (1.0 hour)
(Includes .50 hour of legal ethics)

• Nancy Young Hart, *Wells, Peyton, Greenberg & Hunt, L.L.P. Beaumont*

1:00 **After Lunch Break**

Afternoon Moderator:

Hon. Rory R. Olsen, Harris County Probate Court No. 3

1:15 **The Trial of a Will Contest (.75 hour)**

• Jill W. Young, *MacIntyre & McCulloch, LLP Houston*

2:00 **Estate Planning in Changing (and Challenging) Financial Times (.75 hour)**

• Mickey R. Davis, *Bracewell & Giuliani LLP Houston*

3:00 **Tax Planning for Persons with Disabilities (.75 hour)**

• C. Christine Borrett, *Crady, Jewett & McCulley, LLP Houston*

3:45 **Adjourn**

Total MCLE Hours for Friday: 5.75 hours, .75 hour of legal ethics

WILLS AND PROBATE INSTITUTE

Thursday, September 24, 2009

- 8:00 **Registration and Continental Breakfast sponsored by Encore Trust, a division of Encore Bank**
- 8:50 **Welcome and Opening Remarks**
• Donald J. Guter, *Dean and President, 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. Mike Wood, Harris County Probate Court No. 2

9:00 **Legislative Update (1.0 hour)**

• William D. Pargaman, *Brown McCarroll, L.L.P. Austin*

10:00 **Texas Ethics: Complying with Professional Obligations (.50 hour) (Ethics Topic)**

• Jennifer A. Hasley, *Hasley Scarano, L.L.P. Houston*

10:30 **Morning Break**

10:45 **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*

11:45 **Medicaid Update (.75 hour)**

• Wesley E. Wright, *Wright Abshire, Attorneys Houston*

12:30 **Lunch Break** (pick up lunch and return to the auditorium)

Planning Committee

Jeannine C. Flynn, Chair
Attorney at Law

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

John L. Hopwood
Locke Lord Bissell & Liddell LLP

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

Robert S. MacIntyre, Jr.
MacIntyre & McCulloch, LLP

Tammy C. Manning
Galligan & Manning

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

Michael C. Riddle
Riddle, Butts & Akiens, LLP

Helen B. Wils
Crain, Caton & James, P.C.

Wesley E. Wright
Wright Abshire, Attorneys

Lisa L. Dahm, J.D., LL.M.- Health
Director of Continuing Legal Education and
Adjunct Professor
South Texas College of Law

Linda Roberts
Program Administrator
South Texas College of Law

TO REGISTER

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

MAIL (Check or credit card)
South Texas College of Law
CLE Department
1303 San Jacinto
Suite 1115
Houston, TX 77002-7006

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 22, 2009. No refunds will be granted thereafter.

ACCREDITATIONS

The Guardian and Ad Litem Certification Course is accredited by the State Bar of Texas for 4.5 MCLE Hours, including 1.25 Legal Ethics Hours.

The Wills and Probate Institute is accredited by the State Bar of Texas for 13.0 MCLE Hours, including 2.5 Legal Ethics Hours.

Both seminars are accredited by the Texas Board of Legal Specialization in Estate Planning & Probate Law.

SCHOLARSHIPS

Limited, partial tuition scholarships are available for attorneys with government agencies and nonprofit organizations. Direct written requests to Jean Zoch, Associate Director.

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.

HOTELS - \$139 per night. **Guaranteed until September 1, 2009.**
Courtyard by Marriott, 916 Dallas Street (888) 269-2163
Residence Inn by Marriott, 904 Dallas Street (800) 730-3931
Both hotels located two blocks from the law school.

PARKING

Fannin Garage, 1112 Clay Street, \$5.00 per day. (Early Bird Special: Enter by 9:00 a.m. and pay only \$3.50). 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 26, 2009 or as soon thereafter as possible.

Registration Form

Guardian and Ad Litem Certification Course, September 23, 2009 24th Annual Wills and Probate Institute, September 24-25, 2009

1 South Texas College of Law 24th Annual Wills and Probate Institute

- \$415 Attorneys (\$515 with Guardian and Ad Litem Certification Course)
 \$335 Paralegals and Legal Assistants
 \$145 Attorney's 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 _____