

12th Annual Course

Fiduciary Litigation



LIVE San Antonio • November 30-December 1, 2017 • Sheraton Gunter Hotel

VIDEO Dallas • January 18-19, 2018 • Cityplace Events



MCLE CREDIT
11 Hours (2.5 Ethics)

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Course Materials [↓](#)

TexasBarCLE.com
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*Education by the Bar,
for the Bar*

TexasBarCLE presents the 12th Annual Course

Fiduciary Litigation



Sheraton Gunter Hotel

Register early and **save up to \$100!**

Lawyers licensed 5 years or less take **HALF OFF!**

(See page 3 for details.)

LIVE San Antonio

November 30-December 1, 2017
Sheraton Gunter Hotel

Register by **November 16** to save!

VIDEO Dallas

January 18-19, 2018
Cityplace Events

Register by **January 4** to save!

Thursday

7.5 hours including 1.5 ethics

- 8:00 **Registration**
▶ Breakfast sponsored by Bank of Texas
- 8:40 **Welcoming Remarks**
Course Director
Darlene Payne Smith, *Houston*
Crain Caton & James
- 8:45 **Legislative and Case Law Updates Involving Fiduciary Actions** .75 hr
Craig Hopper, *Austin*
Hopper Mikeska
- 9:30 **Joint and Several Liability and Cap Busting in Fiduciary Cases** .5 hr (.25 ethics)
Alexander B. Klein, III, *Houston*
The Klein Law Firm
- 10:00 **Creative Discovery and Cost Saving Measures in Fiduciary Litigation** .5 hr
Ray J. Black, Jr., *Houston*
The Black Law Firm
- 10:30 **Break**
- 10:45 **When the Fiduciary Duty Begins and Ends - Business vs. Family** .75 hr (.5 ethics)
Charla Bradshaw, *Denton*
KoonsFuller
- 11:30 **When Is a Declaratory Judgment Proper?** .5 hr
Hon. Christine Butts, *Houston*
Judge, Harris County Probate Court No. 4
Hon. Clarinda Comstock, *Houston*
Associate Judge, Harris County Probate Court No. 4

- 12:00 **Break - Lunch Provided**
- 12:15 **Luncheon Presentation: Agents and Managers for Athletes, Actors, and Musicians and the Related Fiduciary Duties** .5 hr
Keith Morris, *Houston*
Ostrom Morris
- 12:45 **Break**
- 1:00 **Is Tortious Interference Dead or Merely in a Temporary Coma?** .5 hr
Darlene Payne Smith, *Houston*
Crain Caton & James
- 1:30 **Texas Revised Uniform Fiduciary Access to Digital Assets Act** .75 hr
Larry A. Flournoy, Jr., *Dallas*
Jordan Flournoy
- 2:15 **Charging the Jury** .75 hr
Hon. Brett Busby, *Houston*
Justice, 14th Court of Appeals
Michael W. Eady, *Austin*
Thompson, Coe, Cousins & Irons
Hon. Kent Sullivan, *Austin*
Jackson Walker
- 3:00 **Networking Break**
- 3:15 **Options for Seeking Interim Relief in Trust and Estate Litigation** .75 hr (.25 ethics)
Sarah Patel Pacheco, *Houston*
Crain Caton & James
- 4:00 **Aiding and Abetting** .5 hr (.25 ethics)
E. Link Beck, *El Paso*
Beck & Hall
- 4:30 **Partnership Fiduciary Claims and Defenses** .75 hr (.25 ethics)
Hon. David Keltner, *Fort Worth*
Kelly Hart & Hallman
Prof. Elizabeth S. Miller, *Waco*
Baylor Law School
- 5:15 ▶ **Adjourn to Cocktail Party and Reception sponsored by Cadence Bank**

Friday

3.5 hours including 1 ethics

- 8:00 ▶ **Breakfast sponsored by Bank of Texas**
- 8:25 **Announcements**
- 8:30 **Dealing with Policies and Protocols of Banking Institutions** .5 hr (.25 ethics)
David F. Johnson, *Fort Worth*
Winstead
- 9:00 **Suing and Collecting on Bonds for Breaches by Administrators and Guardians** .75 hr
R. Dyann McCully, *Fort Worth*
The Blum Firm
- 9:45 **Legal Malpractice Update on Breach of Fiduciary Duties** .5 hr ethics
Dale Jefferson, *Houston*
Martin, Disiere, Jefferson & Wisdom
- 10:15 **Break**
- 10:30 **What the New "Fiduciary Rule" Means for Trustees and Investment Advisors** .75 hr
Joseph Marrs, *Houston*
Johns Marrs Ellis & Hodge
- 11:15 **The Best and Worst of What We See** 1 hr (.25 ethics)
Moderator
Charlie M. Wilson, III, *Dallas*
Goranson Bain
Panelists
Hon. Kelly M. Cross, *San Antonio*
Judge, Probate Court No. 1
Hon. Claudia Laird, *Conroe*
Judge, Montgomery County Court at Law No. 2
Hon. Mike Wood, *Houston*
Judge, Harris County Probate Court No. 2
- 12:15 **Adjourn**

Thank You to Our Sponsors



Darlene Payne Smith
and the Fiduciary Section of
Crain, Caton & James

Ways to Save on This Course!

Meet the Register by Deadline and Save \$50

because early registrations help us ensure that sufficient course books, seating, and refreshments are available. Course materials and seating will be reserved for preregistrants until the start of the first topic.

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TexasBarCLE offers scholarships for live courses, video replays, online classes, and webcasts. To apply or learn more, call 800-204-2222, x1490, Mon-Fri 8am-5pm CT. Please apply at least two weeks prior to any live/video replay course or at least one week prior to any webcast or online class.

Active Texas State, County, and 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.

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is subject to change and does not guarantee available space.

If You Need Special Accommodations to Attend or Have a Food Allergy,

please contact us as soon as possible at 800-204-2222 x1751. 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.

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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 6-8 weeks after the course. 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!

Interested in Sponsoring or Exhibiting at this Course or Others?

Contact Julie Marshall at 512-427-1797 or julie.marshall@texasbar.com.

Policy of Impartiality

The State Bar of Texas does not endorse political candidates. When a candidate for the 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.

MCLE CREDIT

11 Hours (2.5 Ethics)

MCLE Course No: 928007865

Applies to the Texas Bar College and to the Texas Board of Legal Specialization in Civil Appellate Law and Civil Trial Law.

Reserve Your Hotel Room Early

Hotel rooms have been blocked at special rates on a space available basis. To make a reservation, contact the hotel and indicate that you will be attending this State Bar of Texas course.

LIVE San Antonio

Sheraton Gunter Hotel
205 East Houston Street
San Antonio, TX 78205
(210) 554-1740

Deadline: October 28

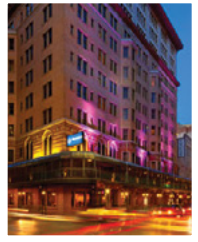
\$139 single/double

Parking: \$24 per day, valet only.

Or make your reservation online at:

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The reserved block of rooms may fill up before the deadline. Act Now!



VIDEO Dallas

Cityplace Events
2711 N. Haskell Avenue
Dallas, TX 75204
(214) 515-5100

Parking: Self-parking is complimentary in the Cityplace Events garage.

No hotel rooms have been blocked for this video replay.



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LB# 972298
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Dallas, TX 75397-2298
check or credit card

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laura.angle@texasbar.com
for group discount information.

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Fiduciary Litigation

1 **Fiduciary Litigation** [8325]
San Antonio LIVE, November 30-December 1, 2017
 Regular Registrant..... \$495
Take \$50 OFF: Register by November 16
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Dallas VIDEO, January 18-19, 2018
 Regular Registrant..... \$395
Take \$50 OFF: Register by January 4
 Licensed 5 years or less, **HALF OFF** \$197.50*

I may attend complimentary because I am a (see p. 3):
 Qualifying judge Judge's staff attorney

*No discounts in section 3 may be taken.

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

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