A TOPICAL GUIDE

ADVANCED ESTATE PLANNING AND PROBATE ARTICLES 1985-2010

by

JERRY FRANK JONES

400 West 15th
Suite 975
Austin, TX 78701

State Bar of Texas
2010 Annual Advanced Estate Planning
And Probate Course

2010

JERRY FRANK JONES
400 West 15th, Suite 975
Austin, TX 78701
Phone: (512) 476-2929
jerry@jerryfrankjones.com

Honors: **Texas Monthly Super Lawyer:** 2003--2009
The Best Lawyers in America 2006--2009
Education: Williams College, Williamstown, Mass., B.A. 1967;
University of Texas-Austin, J.D, 1971
Certification: Board Certified, Estate Planning and Probate, State Bar of Texas.
Bicycle Assembly and Maintenance, Barnett Bicycle Institute, 2004
Fellow: American College of Trust and Estate Counsel
Instructor: U. of Texas, Legal Assistant Program, Estate Planning & Probate (1989-1995)
Author:

- Presented: "Exculpatory Clauses," Fiduciary Litigation Course, State Bar (2009)
- "LIMITATIONS IN FIDUCIARY LITIGATION," Advocate, Litigation Section, State Bar of Texas 2009.
- "'HE'S DEAD?' Suing and Defending When There is A Dead Body," Car Crash Seminar 2005-2006, University of Texas, School of Law
- "HE'S INCAPACITATED? Powers of Attorney." Advanced Real Estate Drafting Course, State Bar of Texas 2005.
- "A TOPICAL GUIDE: Advanced Estate Planning and Probate Course Articles" State Bar of Texas, Annual Advanced Estate Planning and Probate Course (Originally prepared in 1992; updated each year through 2010)
- "'HE'S DEAD?' Real Estate in a Decedent's Estate," Advanced Real Estate Drafting Course 2002
- "HE'S INCAPACITATED? Powers of Attorney." Advanced Real Estate Drafting Course, State Bar of Texas 2005.
- "TEXAS LEGISLATIVE REPORT" 2003, 2001, 1999, 1997 State Bar of Texas, Annual Advanced Estate Planning and Probate Course.
- "The 706 for Country Lawyers and Other Simple People," Travis County Probate and Trust Law Section, 1994.
- "DEATH AND TAXES: An Introduction To Taxes Concerning A Probate Attorney," prepared for the University of Texas Legal Assistant Program--1993.

State Bar of Texas: Real Estate, Probate and Trust Law Section: Chair (2001-2002), Council (1994-1998) and Legislative Liaison (1997–2003)**;** Pattern Jury Charges: Family Law Committee, Probate Subcommittee Chair (2009)

Texas Legislature

- Legislative Liaison, Real Estate, Probate and Trust Law Section, State Bar of Texas (1997–2003)
- Legislative Liaison, Texas Academy of Probate Lawyers (1997-2003)
- Member, Texas Legislative Interim Study Committee on Community Property Laws (1999-2000)

Alp d'Huez Club: October 2005.

A TOPICAL GUIDE
Advanced Estate Planning and Probate
ARTICLES
1985-2010

by
JERRY FRANK JONES
400 West 15th Street, Suite 975
Austin, TX 78701

Part 1: TAX . . . 1
I. **KEYNOTE** . . . 1
II. **CURRENT DEVELOPMENTS** . . . 1
III. **GENERAL** . . . 1
IV. **ESTATE AND GIFT TAX** . . . 2
A. **Marital Issues** . . . 2
B. **Gifts** . . . 3
C. **Valuations** . . . 4
D. **Charitable Gifts** . . . 4
E. **Disclaimers** . . . 5
F. **Insurance** . . . 5
G. **Irrevocable Trusts** . . . 6
H. **International and Aliens** . . . 6
V. **SECTION 2701 et seq AND ITS PRECURSORS** . . . 7
VI. **GENERATION SKIPPING TAX** . . . 8
VII. **INCOME TAX** . . . 8
VIII. **TRUSTS** . . . 9
IX. **TAXES AND BUSINESS ENTITIES** . . . 10
A. **General** . . . 10
B. **Family Limited Partnerships** . . . 11
C. **Choice of Entities** . . . 12
D. **Buy Sell Agreements** . . . 12
E. **Valuations** . . . 12
X. **DEFERRED COMPENSATION (IRAs, PENSIONS ETC)** . . . 12
XI. **TAX CONSIDERATIONS IN PROBATE AND TRUST LITIGATION** . . . 13
XII. **TAX CONSIDERATION IN ADMINISTERING AN ESTATE** . . . 13
XIII. **TAX PROCEDURES AND LITIGATION** . . . 14
XIV. **LIFE ESTATES** . . . 14
XV. **STATE TAXES:** . . . 14

Part 2: NONTAX . . . 15
I. **KEYNOTE** . . . 15
II. **CURRENT DEVELOPMENTS** . . . 15
A. **Case Law** . . . 15
B. **Legislative** . . . 15
III. **ISSUES WITH OTHER STATES** . . . 16
IV. **JURISDICTION** . . . 16
V. **INTESTACY** . . . 16
VI. **NON PROBATE ASSETS (Joint Accounts etc)** . . . 16
VII. **PROBATE ALTERNATIVES** . . . 17
VIII. **PROBATE ADMINISTRATION** . . . 17
A. **General:** . . . 17
B. **Spouses & Marital Property** . . . 17

C. **Ad Litems**. 18
D. **Management of Fiduciary Assets**, ... 18
E. **Representing the Individual Executor/Trustee**. 18
F. **Independent Administration**:. 19
G. **Dependent Administration**, ... 19
H. **Debts, Taxes Reimbursement, and Claims**. 19
I. **Community Property**. 20
J. **Sureties**: 20
K. **Termination:** 20
L. **Procedure:** 20
IX. **MENTAL HEALTH** 21
X. **GUARDIANSHIP**. 21
XI. **AD LITEMS**. 22
XII. **LITIGATION**. 22
A. **Will Contests**. 22
B. **Construction**. 23
C. **Fiduciary Litigation**. 23
D. **Other Litigation**. 24
E. **Jurisdiction**. 25
F. **Procedure**. 25
G. **Discovery**. 26
H. **Evidence**. 26
I. **Settlement**. 26
J. **Tax Considerations**. 27
K. **Damages**. 27
L. **Appeals** 27
XIII. **WILLS**. 27
XIV. **TRUSTS**. 28
XV. **INTERVIVOS ("LIVING" AND "LOVING") TRUSTS**. 29
XVI. **MOBILE (MIGRATING) CLIENTS**. 29
XVII. **FIDUCIARIES**. 29
XVIII. **THE BENEFICIARY**. 30
XIX. **INSURANCE** 31
XX. **BUSINESS ENTITIES AND BUSINESS TRANSACTIONS**. 31
XXI. **CREDITORS**. 32
XXII. **SPOUSES**. 33
XXIII. **POWERS OF ATTORNEY & OTHER DIRECTIVES**. 34
XXIV. **ELDER LAW & GOVERNMENTAL ASSISTANCE**. 34
XXV. **THE ENVIRONMENT:**. 35
XXVI. **MEDIATION**. 36
XXVII. **LAWYERS, ETHICS & CLIENTS**. 36
XXVIII. **RUNNING THE OFFICE**. 37
A. **Office**. 37
B. **Fees & Fee Agreements**. 37
C. **Forms**. 38
D. **Computers**. 38
E. **Winding Up.** 38
XXIX. **REAL ESTATE**. 38
XXX. **ATTORNEYS FEES**: 39
XXXI. **CHARITIES**: 39
XXXII. **DISPOSITION OF REMAINS:**. 39
XXXIII. **INTERNATIONAL AND ALIENS**. 39

Part 1: TAX

I. **KEYNOTE**

A. WASHINGTON: THE INSIDE SCOOP, Ronald D. Aucutt 2003 30
B. STATUS OF THE PROFESSION, William P. Cantwell 1991 A
C. WHERE ARE WE GOING?, J. Thomas Eubank, Jr. 1989 E

II. **CURRENT DEVELOPMENTS**

A. TAX LAW UPDATE, Stanley M. Johanson 2010 10
B. TAX LAW UPDATE, Stanley M. Johanson 2009 11
C. HOT TOPICS IN GIFT AND ESTATE TAXATION, Cynthia H. Camuel & Tina R. Green 2008 26
D. TAX LAW UPDATE, Stanley M. Johanson 2008 13
E. TAX LAW UPDATE, Stanley M. Johanson. 2007 9
F. TAX LAW UPDATE, Professor Stanley M. Johanson 2006 10
G. TAX LAW UPDATE, Professor Stanley M. Johanson 2005 8
H. TAX LAW UPDATE, Professor Stanley M. Johanson 2004 8
I. WASHINGTON: THE INSIDE SCOOP, Ronald D. Aucutt 2003 30
J. TAX UPDATE, Stanley M. Johanson. 2002 15
K. PLANNING IN LIGHT OF TAX REFORM 2002 2
L. TAX UPDATE, Stanley M. Johanson 2001 1
M. TAX UPDATE, Stanley M. Johanson 2000 10
N. TAX UPDATE, Stanley M. Johanson 1999 A
O. TAX UPDATE, Stanley M. Johanson. . . . . 1998 L
P. TAX UPDATE, Stanley M. Johanson 1997 A
Q. IRS HOT TOPICS, Rust E. Reid 1997 U
R. IRS OFFICIAL/HOT TOPICS, James Gulley 1997 U
S. TAX UPDATE, Stanley M. Johanson 1996 A
T. THE STATE OF INCOME AND ESTATE TAX IN THE UNITED STATES, Ronald D. Aucutt.. . . . . 1996 I
U. CASE LAW AND RULINGS UPDATE, W.H. BRIAN, JR. 1995 A
V. FEDERAL TAX UPDATE-WHAT'S ON THE HORIZON? L. Henry Gissell, Jr. 1993 N
W. CURRENT DEVELOPMENTS IN FEDERAL ESTATE, GIFT, AND GENERATION-SKIPPING TAXATION, James J. Aycock 1991 G
X. CURRENT DEVELOPMENTS IN FEDERAL ESTATE, GIFT, AND GENERATION-SKIPPING TAXATION, James J. Aycock and Michael J. Cenatiempo 1990 Y
Y. RECENT FEDERAL ESTATE PLANNING DEVELOPMENTS, Malcolm A. Moore. . . . . 1989 A
Z. CURRENT DEVELOPMENTS IN ESTATE, GIFT, GENERATION SKIPPING AND INCOME TAX, John DeBruyn 1988 A
AA. RECENT WEALTH TRANSFER TAX DEVELOPMENTS, Professor Jeffrey N. Pennell 1987 E
BB. WHAT'S NEW ON THE HORIZON IN WEALTH TRANSFER TAXATION, Professor Jeffrey N. Pennell 1986 U
CC. ESTATE AND GIFT TAXATION-CURRENT DEVELOPMENTS, Malcolm A. Moore 1985 A

III. **GENERAL**

A. ESTATE PLANNING IN 2010 AND BEYOND: WHERE WE ARE AND WHERE WE GO FROM HERE, Stephen R. Akers 2010 23
B. ESTATE PLANNING FOR THE TERMINALLY ILL CLIENT, Santo (Sandy) Bisignano, Jr. 2009 33
C. PLANNING FOR UNMARRIED COUPLES, Gina D. Patterson 2009 14

D. ESTATE PLANNING FOR POLITICAL CONTRIBUTIONS, Eric Reis 2008 20
E. ESTATE PLANNING GEMS, John F. Bergner 2008 1
F. PLANNING FOR UNMARRIED COUPLES, Kathryn G. Henkel 2008 31
G. PRINCIPALS OF WEALTH TRANSFER: FROM BASICS TO BELLS AND WHISTLES, Marjorie J. Stephens 2007 34
H. REVIEW OF ISSUES WITH UNFUNDED BYPASS TRUSTS, Mickey Davis 2006 34
I. THE PROS AND CONS OF THE BYPASS TRUST AS IRA BENEFICIARY, Karen Gerstner 2006 31
J. PLANNING FOR OWNERS OF OIL AND GAS INTERESTS, Craig Adams 2006 29
K. THE WELL-PREPARED EXECUTIVE: PERSONAL WEALTH PRESERVATION STRATEGIES, Roberet Barbetti.. . . . . 2006 21
L. WHEN THE MUSIC'S OVER, TURN OUT THE LIGHTS? Santo Bisignano, Jr., Michael V. Bourland and Hal Moorman 2005 5
M. ESTATE PLANNING FOR CLIENTS WITH SHORTENED LIFE EXPECTANCIES, Kathryn Henkel 2005 4
N. ESTATE PLANNING FOR THE LOTTERY AND OTHER WINNERS, Karen S. Gerstner 2004 28
O. ONSHORE, Santo Bisignano 2003 25
P. TAX LAW UPDATE, Stanley M. Johanson. 2003 10
Q. PLANNING IN LIGHT OF TAX REFORM 2002 2
R. DRAFTING WILLS AND TRUSTS FOR THE THIRD MILLENNIUM, Mickey Davis 2001 31
S. TAX PLANNING FORTHE NON-TRADITIONAL FAMILIES, Holly Gilman 2001 24
T. ESTATE PLANNING FOR THE SINGLE WEALTHY CLIENT WHO IS NOT CHARITABLY INCLINED, Santo Bisignano, Jr.. . . . . 2000 3
U. THE NEW MILLENNIUM PLANNING TECHNIQUES AND STRATEGIES- FUTURE ISSUES FACING ESTATE PLANNERS, Richard Oshins 1999 K
V. ESTATE PLANNING FOR THE MID-SIZED ESTATE, Ronald Cresswell 1998 K
W. ESTATE PLANNING TO PROTECT THE SURVIVING SPOUSE, Glenn Karisch 1997 Q
X. ESTATE PLANNING FOR THE LARGE ESTATE, Kathryn G. Henkel 1997 I
Y. ESTATE PLANNING FOR THE MEDIUM SIZED ESTATE—BYPASS TRUST PLANNING AND OTHER GOOD STUFF, Santo Bisignano, Jr. 1996 C

IV. **ESTATE AND GIFT TAX**

A. **Marital Issues**

1. FLP PLANNING AND MARITAL DEDUCTION, Stephen R. Akers 2009 18
2. PLANNING FOR UNMARRIED COUPLES, Gina D. Patterson 2009 14
3. PLANNING FOR UNMARRIED COUPLES, Kathryn G. Henkel 2008 31
4. THE SPOUSAL ILIT - TAXATION, PLANNING, AND DRAFTING, Santo (Sandy) Bisignano, Jr. 2008 28
5. PRINCIPALS OF WEALTH TRANSFER: FROM BASICS TO BELLS AND WHISTLES, Marjorie J. Stephens.. . . . . 2007 34
6. FEDERAL PREEMPTION OF TEXAS MARITAL PROPERTY LAW, Thomas G. Featherson, Jr. 2006 2
7. FUNDING MARITAL DEDUCTION AND BYPASS TRUSTS, Mickey Davis 1999 BB
8. ESTATE PLANNING FOR THE INCAPACITATED SPOUSE, Charles E. King 1999 D
9. THE FAMILY LAW PARTNERSHIP–MARITAL PROPERTY AND ETHICAL CONSIDERATIONS, Bernard Jones 1999 C
10. HOW I STOPPED W0RRYING AND LEARNED TO LOVE THE BOMB, Alvin J. Golden.. . . . . 1998 CC
11. ESTATE PLANNING TO PROTECT THE SURVIVING SPOUSE, Glenn Karisch 1997 Q
12. ESTATE PLANNING FOR THE LARGE ESTATE, Kathryn G. Henkel 1997 I
13. ESTATE PLANNING FOR THE MEDIUM SIZED ESTATE—BYPASS TRUST PLANNING AND OTHER GOOD STUFF, Santo Bisignano, Jr. 1996 C
14. HOT TOPICS IN MARITAL DEDUCTION, Alvin J. Golden 1996 X
15. MARITAL DEDUCTION FUNDING CLAUSE--WHAT ARE THE ALTERNATIVES? Professor Stanley M. Johanson. . . . . 1995 Z

16. ESTATE PLANNING FOR THE NON-RESIDENT AND RESIDENT ALIEN, Jane H. Lerner 1995 S
17. ESTATE PLANNING FOR THE LARGE ESTATE, Kathryn G. Henkel 1995 L
18. Q-DOTS AND THE PROPOSED REGULATIONS Steve Akers 1994 S
19. THE ESTATE PLANNING/DIVORCE INTERFACE Robert H. Kroney, Thomas P. Goranson, Honorable Paula Larsen 1994 X
20. Q-TIP ELECTIONS, Kathleen Ford Bay. . . . . 1993 AA
21. MARITAL DEDUCTION ISSUES AND QDOTS Professor Stanley M. Johanson 1992 W
22. FORM 706 AND MARITAL TRUST WORKSHOP Thomas E. Berry, Richard R. Cruse, James L. Gulley 1992 L
23. MARITAL DISPOSITIONS: WHICH SPOUSE IS, OR IS DEEMED TO BE TRANSFERROR, Professor Stanley M. Johanson 1990 A
24. INTERNATIONAL ESTATE PLANNING (WITH EMPHASIS ON THE QUALIFIED DOMESTIC TRUST), Rodney C. Koenig and Judith Williams 1989 B
25. TYPES AND FUNDING OF THE MARITAL DEDUCTION, Kenneth McLaughlin, Jr.. . . . . 1988 R
26. HOW TEXAS LAWYERS ARE HANDLING MARITAL DEDUCTION PROBLEMS, Professor W. Reed Quilliam, Jr. 1987 N
27. THE MARITAL DEDUCTION FIVE YEARS LATER, Richard S. Donoghue 1986 G
28. THE MARITAL DEDUCTION BROUGHT CURRENT--WITH EMPHASIS ON THE QTIP REGULATIONS, Professor Stanley M. Johanson 1985 I

B. **Gifts**

1. DEFINED-VALUE TRANSFERS, Stephen Taylor Dyer 2008 29
2. LIMITS OF McCORD, Stephanie Loomis-Price 2007 17
3. NEW TWIST ON AN OLD IDEA - THE BENEFICIARY INTENTIONALLY DEFECTIVE GRANTOR TRUST SALE, Jeffrey N. Myers. 2007 19
4. GRATs V INTENTIONALLY DEFECTIVE GRANTOR TRUSTS, Jeffrey Myers 2006 17
5. PLANNING TO DEFECT: MULTIPLE USES OF INTENTIONAL GRANTOR TRUSTS, Marjorie J. Stephens 2000 22
6. CURRENT ISSUES: AUDIT AND LITIGATION ISSUES PERTAINING TO THE FORMATION OF FAMILY OWNED AND CONTROLLED PARTNERSHIPS AND LIMITED LIABILITY COMPANIES, Larry W. Gibbs 2000 6
7. ANNUAL EXCLUSIONS INVOLVING GRANDPARENT, GRANDCHILD, CRUMMY TRUSTS, MEDICAL INSURANCE, TUITION, ETC, Kate Hopkins 1999 DD
8. STRINGS AND ROPEBURNS REVISITED: ESTATE, GIFT AND INCOME TAX CONSEQUENCES OF GRANTOR RETAINED RIGHTS AND POWERS, William Scanlan. . . . . 1999 X
9. ESTATE PLANNING FOR THE LARGE ESTATE, Kathryn G. Henkel 1997 I
10. SELECTED GIFT TAX ISSUES (INCLUDING GIFT SPLITTING, GST ALLOCATIONS AND STATUTE OF LIMITATIONS),Taryn N. Milewski 1995 U
11. ESTATE PLANNING FOR THE LARGE ESTATE, Kathryn G. Henkel 1995 L
12. A PEEK AT THE ESTATE PLANNER'S "EXOTIC" TOOLBOX (ADV. ESTATE PLANNING DEVICES-i.e., GRATS, QPRTS, SPLAT, etc.), Jonathan G. Blattmachr 1995 C
13. HOW TO PAY FOR CHILDREN'S AND GRANDCHILDREN'S EDUCATION,Kate H. Hopkins. . . . . 1992 Z
14. DISCLAIMERS VERSUS GIFTS, Richard S. Donoghue 1989 P
15. DRAFTING TRUSTS FOR S CORPORATION STOCK AND UPDATE ON CRUMMEY WITHDRAWAL RIGHTS, Robert H. Kroney 1986 S

C. **Valuations**

1. ALTERNATE VALUATION, Larry M. Bass 2009 17
2. DEFINED-VALUE TRANSFERS, Stephen Taylor Dyer 2008 29
3. DISCOUNTS WITHOUT THE GLITZ, Alan K. Davis. 2008 6
4. LIMITS OF McCORD, Stephanie Loomis-Price 2007 17
5. GRATs V INTENTIONALLY DEFECTIVE GRANTOR TRUSTS, Jeffrey Myers 2006 17
6. PREPARING AND FILING THE FORM 706: WHO, WHAT , HOW, WHEN AND WHERE, Glen Yale 2005 10
7. ESTATE PLANNING FOR THE LOTTERY AND OTHER WINNERS, Karen S. Gerstner 2004 28
8. VALUATION DISCOUNTS, VALUE REDUCTION, Charles E. King. 2002 13
9. FUNDING MARITAL DEDUCTION AND BYPASS TRUSTS, Mickey Davis 1999 BB
10. VALUING ASSETS FOR FORM 706: PUTTING “GROSS” IN “GROSS ESTATE,” Glen Yale. 1999 W
11. VALUATION ISSUE IN FLP’s, Stacy Eastland 1998 X
12. TECHNIQUES TOOLBOX, BUY-SELLS, STOCK OPTIONS— PLANNING WITH TROUBLESOME ASSETS, Marjorie Johnsen Stepheens. . . . . 1998 V
13. ESTATE PLANNING FOR THE LARGE ESTATE, Kathryn G. Henkel 1997 I
14. WHAT IS IT WORTH--AN OVERVIEW OF VALUATION ISSUES, Lawrence M. Bass 1996 F
15. SECTION 2032A SPECIAL USE VALUE- THE LITTLE MAN UPON THE STAIR (OR, I'VE GOT THOSE RECAPTURE TAX BLUES), Donald H. Kelley 1995 AA
16. ESTATE PLANNING FOR THE LARGE ESTATE, Kathryn G. Henkel 1995 L
17. A PEEK AT THE ESTATE PLANNER'S "EXOTIC" TOOLBOX (ADV. ESTATE PLANNING DEVICES-i.e., GRATS, QPRTS, SPLAT, etc.), Jonathan G. Blattmachr.. . . . . 1995 C
18. AN ESTATE PLANNER'S LOOK AT THE LIMITED LIABILITY COMPANY - IS IT A VIABLE ALTERNATIVE TO CORPORATIONS, LIMITED PARTNERSHIPS AND TRUSTS? Kent H. McMahan 1994 T
19. SECTION 2032A ELECTION, Alfred G. Holcomb 1993 BB
20. BUSINESS VALUATION WORKSHOP Michael V. Bourland, Larry W. Gibbs, Robert H. Kroney 1992 V
21. THE DOING AND UNDOING OF BUSINESS VALUATIONS, James O. Roberts 1989 AA
22. GRITS, SALES OF REMAINDER INTERESTS AND SPLIT INTEREST PURCHASES: "WHAT'S LEFT AFTER GRADOW AND IRS SECTION 2036(c)?", William Scanlan, Jr.. . . . . 1988 E
23. MAKING USE OF THE ESTATE TAX SAVINGS AVAILABLE FROM IRC SECTION 2032 A, Clark S. Willingham 1986 J
24. ECONOMICS OF USING THE TREASURY TABLES IN SPLIT INTEREST TRANSFERS, William Scanlan, Jr.. . . . . 1986 Q
25. CURRENT VALUATION ISSUES, Rodney C. Koenig 1985 B

D. **Charitable Gifts**

1. CREATIVE APPLICATIONS FOR CHARITABLE ENTITIES, INCLUDING FOR PROFIT LLC’S WITH A NON PROFIT PURPOSE, Michael D. Martin 2010 9
2. CURRENT COMPLIANCE ISSUES FOR YOUR CHARITIES: ARE YOU ALREADY OUT ON A LIMB?, Frank Sommerville, Marilyn G. Phelan and Darren B. Moore 2009 21
3. PRACTICE CHARITABLE PLANNING FOR THE REST OF US, Shannon G. Guthrie and Stephen Saunders 2007 11
4. CHARITABLE PROVISIONS OF THE PENSION PROTECTION ACT OF 2006, Harry W. Wolff 2007 16
5. SOPHISTICATED CHARITABLE PLANNING: HELPING YOUR CLIENTS ACHIEVE THEIR CHARITABLE GOALS ON A TAX-ENHANCED BASIS, Cheryl Cain Crabbe 2006 19

6. CHARITABLE TOOL BOX, Toby Matthew Eisenberg 2004 20
7. CHARITABLE UPDATE, Shannon G. Guthrie. 2002 11
8. CHARITABLE ISSUES WITH OR WITHOUT ESTATE TAX–PHILANTHROPY IS ALIVE AND WELL, Jeffrey Myers 2001 23
9. FOUNDATIONS: TO BE OR NOT TO BE...PRIVATE, OPERATING, COMMUNITY AND SUPPORTING ORGANIZATIONS- THE DELICATE BALANCE OF CONSIDERATIONS OF BENEFITS, COSTS AND CONTROL, Shannon G. Guthrie 2000 31
10. PLANNING AND UTILIZING CHARITABLE TRUSTS, Robert M. Weylandt 2000 20
11. SECTION 2031(C), EXCLUSION FROM ESTATE TAXES AND POST- MORTEM CONSERVATION EASEMENT DONATIONS:WHAT DOES IT ALL MEAN?? Stephen J. Small 2000 17
12. PRIVATE FOUNDATIONS VS. COMMUNITY FOUNDATIONS, Michael Bourland . . . . 1998 H
13. CHARITABLE REMAINDER TRUST PLANNING, Larry Katzenstein 1997 R
14. CARE AND FEEDING PRIVATE FOUNDATIONS, Taryn Milewski 1997 V
15. ESTATE PLANNING FOR THE LARGE ESTATE, Kathryn G. Henkel 1997 I
16. USE OF CHARITABLE GIVING TECHNIQUES IN ESTATE PLANNING: AN UPDATE, Taryn N. Milewski 1996 N
17. ESTATE PLANNING FOR THE LARGE ESTATE, Kathryn G. Henkel. . . . . 1995 L
18. USE OF CHARITABLE GIVING TECHNIQUES IN ESTATE PLANNING, H. Kate Hopkins 1995 F
19. CHARITABLE LEAD TRUSTS,Santo Bisignano, Jr. 1994 R
20. USES OF PRIVATE FOUNDATIONS, Ronald S. Webster 1992 AA
21. NEW AND IMPROVED CHARITABLE GIVING, Marjorie S. Schultz 1990 R
22. CHARITABLE GIVING, David L. Nelson, CPA. . . . . 1989 X
23. CASE STUDIES IN CHARITABLE GIVING, Marjorie S. Schultz 1988 S
24. CHARITABLE PLANNING AFTER THE TAX REFORM ACT OF 1986, Bob D. Harrison 1987 L
25. HOW CHARITABLE TRUSTS CAN BENEFIT THE DONORS AND THEIR FAVORITE CHARITY, Gordon M. Caswell 1986 E

E. **Disclaimers**

1. POST MORTEM TAX PLANNING, Stephen Akers 2005 11
2. DISCLAIMERS IN LIGHT OF 2001, Michael J. Cenatiempo. 2002 24
3. ESTATE PLANNING FOR THE LARGE ESTATE, Kathryn G. Henkel 1997 I
4. ESTATE PLANNING FOR THE MEDIUM SIZED ESTATE— BYPASS TRUST PLANNING AND OTHER GOOD STUFF, Santo Bisignano, Jr. 1996 C
5. DISCLAIMERS IN ESTATE AND POST-MORTEM PLANNING, Richard S. Donoghue 1995 CC
6. ESTATE PLANNING FOR THE LARGE ESTATE, Kathryn G. Henkel 1995 L
7. DISCLAIMERS, Kathryn G. Henkel. . . . . 1993 W
8. DISCLAIMERS VERSUS GIFTS, Richard S. Donoghue 1989 P
9. QUALIFIED DISCLAIMERS UNDER THE NEW REGULATIONS, C. Boone Schwartzel 1988 T

F. **Insurance**

1. THE SPOUSAL ILIT - TAXATION, PLANNING, AND DRAFTING, Santo (Sandy) Bisignano, Jr. 2008 28
2. ESTATE PLANNING OPPORTUNITIES WITH PRIVATE PLACEMENT LIFE INSURANCE, Michael Ripp 2006 20
3. PLANNING WITH LIFE INSURANCE (PRODUCT SELECTION, MARITAL PROPERTY, CREDITOR PLANNING, LIFE INSURANCE TRUSTS, GST ISSUES, SPLIT DOLLAR, PRACTICAL AND FINANCIAL CONSIDERATIONS), Bernard Jones 2004 22
4. FIXING BROKEN ILITS, Stephanie E. Donaho. 2003 31

5. SPLIT-DOLLAR LIFE INSURANCE, Phil Linquist 2003 20
6. WHAT DO WE DO ABOUT SPLIT DOLLAR AND ABOUT ANNUITIES, Philip Lindquist 2001 22
7. LIFE INSURANCE- WHAT YOU DO NOT KNOW COULD HURT YOUR CLIENT, Frank J. Rief III 2000 16
8. EXECUTIVE PLANNING–SPLIT DOLLAR, NON QUALIFIED BENEFIT PLANS, STOCK OPTIONS, RABBI TRUSTS, 2ND TO DIE LIFE INSURANCE POLICY, Panel Discussion, Noel Ice 1999 P
9. CAN WE SPLIT THE BABY?--CREATIVE USES OF SPLIT DOLLAR LIFE INSURANCE IN FLP's AND IN OTHER CONTEXTS, Wendy Farner. . . . . 1998 FF
10. ESTATE PLANNING FOR THE LARGE ESTATE, Kathryn G. Henkel 1997 I
11. IRREVOCABLE LIFE INSURANCE TRUSTS, Santo Bisignano, Jr. 1997 C
12. ESTATE PLANNING FOR THE MEDIUM SIZED ESTATE—BYPASS TRUST PLANNING AND OTHER GOOD STUFF, Santo Bisignano, Jr. 1996 C
13. LIFE INSURANCE PRODUCTS TODAY: OPPORTUNITIES AND PITFALLS FOR SOPHISTICATED CLIENTS AND THEIR ATTORNEYS, Stephen D. Maislin 1995 T
14. AVOIDING INCIDENTS OF OWNERSHIP IN BUSINESS LIFE INSURANCE, Donald O. Jansen. . . . . 1995 E
15. SPLIT DOLLAR LIFE INSURANCE, Lawrence Brody 1994 AA
16. INSURANCE PLANNING, L. Henry Gissell 1992 CC
17. INSURANCE: THE ILLUSIVE ASSET, Robert H. Kroney 1990 T
18. CURRENT DEVELOPMENTS IN INSURANCE, Don E. Fizer 1989 M
19. CREATION, CARE AND FEEDING OF THE IRREVOCABLE LIFE INSURANCE TRUST, Santo Bisignano, Jr.. . . . . 1988 M
20. LIFE INSURANCE AFTER THE TAX REFORM ACT OF 1986, Donald O. Jansen 1987 K
21. CURRENT DEVELOPMENTS IN LIFE INSURANCE PLANNING AND PRODUCTS, Donald O. Jansen 1986 D
22. IRREVOCABLE TRUSTS: DEFENSIVE PLANNING, Dave L. Cornfeld 1986 K

G. **Irrevocable Trusts**

1. INTENTIONALLY DEFECTIVE GRANTOR TRUSTS, Jeffrey N. Myers. 2009 20
2. WHEN THE ONLY ONE YOU TRUST IS YOURSELF - DRAFTING AND PLANNING WITH SELF TRUSTEED IRREVOCABLE NONGRANTOR TRUSTS, Toby M. Eisenberg 2008 2
3. REVIEW OF ISSUES WITH UNFUNDED BYPASS TRUSTS, Mickey Davis 2006 34
4. QPRTs, Jeffrey N. Myers 2004 19
5. FIXING BROKEN ILITS, Stephanie E. Donaho 2003 31
6. SELECTION OF TRUSTEES, Stephen R. Akers. 2003 15
7. TRUST SELECTION & TRUSTEE POWERS CREDITORS & TAX ISSUES/ GUARANTEES/ SELF DEALING, Stephen R. Akers 2002 36
8. TERMINATING AND MODIFYING IRREVOCABLE TRUSTS, Glenn Karisch 1999 CC
9. STRINGS AND ROPEBURNS REVISITED: ESTATE, GIFT AND INCOME TAX CONSEQUENCES OF GRANTOR RETAINED RIGHTS AND POWERS, William Scanlan 1999 X
10. ADMINISTERING THE DISTRIBUTION REQUIREMENT FOR THE TRUST, Randall Lamb. . . . . 1998 DD
11. ESTATE PLANNING FOR THE LARGE ESTATE, Kathryn G. Henkel 1997 I
12. ESTATE PLANNING FOR THE LARGE ESTATE, Kathryn G. Henkel 1995 L
13. "AMENDING" IRREVOCABLE TRUSTS--PLANNING FOR CHANGES AND TECHNIQUES TO CURE IMPERFECT PROVISIONS, Robert S. Newkirk 1988 D
14. IRREVOCABLE TRUSTS: DEFENSIVE PLANNING, Dave L. Cornfeld 1986 K

H. **International and Aliens**

1. INTERNATIONAL ISSUES IN ESTATE ADMINISTRATION, R. Glenn Davis 2010 26
2. FOREIGN ESTATE AND INCOME TAX PLANNING, Michael Baldwin 2005 16
3. A CURRENT LOOK AT TRUST COMMITTEES, TRUST PROTECTORS AND CO-TRUSTEES, Stephen T. Dyer, G. Philip Morehead 2004 23
4. OFFSHORE, Mario A. Mata 2003 26

5. PLANNING FOR NON-RESIDENTS AND CITIZENS OF OTHER COUNTRIES, Gus Vlahadamis. 2001 40
6. FOREIGN ESTATE AND GIFT TAX PLANING (INCLUDING TRANSFER ISSUE, Keith Novick 1997 P
7. OFFSHORE TRUSTS, Duncan Osborne 1997 W
8. ESTATE PLANNING FOR THE LARGE ESTATE, Kathryn G. Henkel 1997 I
9. ESTATE PLANNING FOR THE NON-RESIDENT AND RESIDENT ALIEN, Jane H. Lerner 1995 S
10. ESTATE PLANNING FOR THE LARGE ESTATE, Kathryn G. Henkel. . . . . 1995 L
11. MARITAL DEDUCTION ISSUES AND QDOTS Professor Stanley M. Johanson 1992 W
12. OFFSHORE ENTITIES IN ESTATE PLANNING, Duncan E. Osborne 1991 C
13. PLANNING FOR ALIENS (INCLUDING QUALIFIED DOMESTIC TRUSTS), Henry Ziegler 1991 B
14. INTERNATIONAL ESTATE PLANNING (WITH EMPHASIS ON THE QUALIFIED DOMESTIC TRUST), Rodney C. Koenig and Judith Williams 1989 B

V. **SECTION 2701 et seq AND ITS PRECURSORS**

A. FLP PLANNING AND MARITAL DEDUCTION, Stephen R. Akers 2009 18
B. STRINGS AND ROPEBURNS REVISITED: ESTATE, GIFT AND INCOME TAX CONSEQUENCES OF GRANTOR RETAINED RIGHTS AND POWERS, William Scanlan 1999 X
C. GRATS AND QPRTS ANALYSIS–WHAT’S BEST FOR YOUR CLIENT, Scott Schepps 1999 Q
D. CAN WE SPLIT THE BABY?--CREATIVE USES OF SPLIT DOLLAR LIFE INSURANCE IN FLP’s AND IN OTHER CONTEXTS, Wendy Farner 1998 FF
E. TOOLBOX OF SOPHISTICATED ESTATE PLANNING TECHNIQUES, Marjorie Johnsen Stephens.. . . . . 1998 V
F. FREEZE AND LEAKY FREEZE PLANNING UNDER CHAPTER 14, Kathryn Henkel & Stacy Eastland 1997 T
G. TWO CLASS PARTNERSHIPS IN LIGHT OF 2701, Stacy Eastland 1997 S
H. GRATS, SPLIT PURCHASE RESIDENT TRUST, SPLIT ANNUITY TRUST, PRIVATE ANNUITIES & SCINS, Marjorie Johnson Stephens 1997
I. ESTATE PLANNING--TAKING INTO CONSIDERATION THE COMPLEX VALUATION ADJUSTMENT RULES UNDER CHAPTER 14,Steve R. Akers 1996 E
J. ESTATE PLANNING FOR THE LARGE ESTATE, Kathryn G. Henkel.. . . . . 1995 L
K. A PEEK AT THE ESTATE PLANNER'S "EXOTIC" TOOLBOX (ADV. ESTATE PLANNING DEVICES-i.e., GRATS, QPRTS, SPLAT, etc.), Jonathan G. Blattmachr 1995 C
L. HOUSE GRITS, Ronald R. Cresswell 1993 CC
M. CHAPTER 14, Steve R. Akers 1993 U
N. IRC SECTION 2702: GRITS, GRATS, GRUTS, William Scanlan, Jr. 1992 Y
O. IRS SECTION 2701/2704, Steve R. Akers.. . . . . 1992 B
P. SECTION 2701, Jonathan G. Blattmachr 1991 K
Q. WHAT ELSE IS LEFT OF TRANSFER TECHNIQUES?, Kenton E. McDonald 1990 S
R. GRITS, SALES OF REMAINDER INTERESTS AND SPLIT INTEREST PURCHASES: "WHAT'S LEFT AFTER GRADOW AND IRS SECTION 2036(c)?", William Scanlan, Jr. 1988 E
S. ECONOMICS OF USING THE TREASURY TABLES IN SPLIT INTEREST TRANSFERS, William Scanlan, Jr. 1986 Q
T. DEALING WITH FAMILY ICONS: SALES OF REMAINDER INTERESTS, SPLIT INTEREST PURCHASES, GRANTOR LEAD TRUSTS AND INSTALLMENT SALES, John H. Mullen, CPA. . . . . 1985 C

VI. **GENERATION SKIPPING TAX**

A. RECURRING ISSUES WITH GST TAX, Darin N. Digby 2009 19
B. THE RULE AGAINST PERPETUITIES, Stephanie E. Donaho 2009 9
C. THE INHERITANCE TRUST: MULTI-GENERATIONAL PLANNING FROM THE BOTTOM UP, Benjamin G. Carter 2007 7
D. GST PLANNING–WHEN YOUR DADDY BECOMES YOUR SON (OR GRANDSON), Michael Baldwin 2006 18
E. GST UNDER THE 2001 RULES, Eric Viehman 2003 18
F. TAX-NUTS & BOLTS OF GST, Patrick John Pacheco 2002 4
G. GENERATION SKIPPING TRANSFER TAX, Eric Viehman.. . . . . 1999 Z
H. GENERATION SKIPPING TAX--EXEMPTION, AN EXEMPTION OF TRUST, Bernard E. Jones 1997 N
I. MANAGING THE GENERATION SKIPPING TRANSFER TAX, Kathryn G. Henkel 1996 O
J. ESTATE PLANNING FOR THE MEDIUM SIZED ESTATE—BYPASS TRUST PLANNING AND OTHER GOOD STUFF, Santo Bisignano, Jr. 1996 C
K. ESTATE PLANNING FOR THE LARGE ESTATE, Kathryn G. Henkel 1995 L
L. SELECTED GENERATION SKIPPING TAX ISSUES: ETIPS, ALLOCATION OF EXEMPTIONS, SAMPLE SCHEDULES, Jerry Scroggins. . . . . 1994 U
M. THE ABC'S THROUGH XYZ'S OF GST'S (INCLUDING THE PROPOSED REGULATIONS), Karen S. Gerstner 1993 V
N. REPAIRING GENERATION SKIPPING PLANNING TRUSTS Carol A. Harrington 1992 I
O. FAVORED TRANSFERS FOR GST PURPOSES, Jerold I. Horn 1991 P
P. MARITAL DISPOSITIONS: WHICH SPOUSE IS, OR IS DEEMED TO BE TRANSFEROR, Professor Stanley M. Johanson 1990 A
Q. WEALTH TRANSMISSION AMONG GENERATIONS, Walter Wm. Hofheinz.. . . . . 1990 P
R. SELECTED TOPICS IN GENERATION-SKIPPING, William D. Pargaman 1989 R
S. GENERATION SKIPPING TAX PROBLEM RESOLUTION (PANEL DISCUSSION), Kathryn G. Henkel, Eric Viehman & Walter Wm. Hofheinz 1988 K
T. THE GENERATION SKIPPING TRANSFER TAX--A PLANNING GUIDE, Eric Viehman 1987 H
U. THE GENERATION SKIPPING TRANSFER TAX-A PLANNING GUIDE, Eric Viehman 1986 U

VII. **INCOME TAX**

A. INCOME TAXATION OF TRUSTS AND ESTATES, Mickey R. Davis.. . . . . 2009 8
B. INSTALLMENT SALES PANEL, Stephen R. Akers, Michael D. Allen, Cheryl Cain Crabbe & Derek L. Fletcher 2008 30
C. NEW TWIST ON AN OLD IDEA - THE BENEFICIARY INTENTIONALLY DEFECTIVE GRANTOR TRUST SALE, Jeffrey N. Myers 2007 19
D. INCOME TAX NUGGETS: PRE- AND POST- DEATH, Theodore B. Atlass 2007 15
E. TEXAS TRUST CODE CHANGES: DRAFTING AND OTHER PRACTICAL IMPLEMENTATION ISSUES FOR IMPORTANT TRUST CODE CHANGES OVER THE LAST SEVERAL YEARS, William Pargaman 2006 30
F. PLANNING FOR OWNERS OF OIL AND GAS INTERESTS, Craig Adams.. . . . . 2006 29
G. GRATs V INTENTIONALLY DEFECTIVE GRANTOR TRUSTS, Jeffrey Myers 2006 17
H. FOREIGN ESTATE AND INCOME TAX PLANNING, Michael Baldwin 2005 16
I. POST MORTEM TAX PLANNING, Stephen Akers 2005 11
J. INCOME TAXATION OF PARTNERSHIP DISTRIBUTION, Carol Cantrell 2003 17
K. SUBCHAPTER J, THE VERY BASICS, Johnny Rex Buckles.. . . . . 2003 31
L. INCOME TAXATION OF TRUST & ESTATE, Mark L. Ascher 2002 12
M. INTERDISCIPLINARY ISSUES INVOLVING LIMITED PARTNERSHIPS AND LIMITED LIABILITY COMPANIES: INCOME, EMPLOYMENT AND FRANCHISE TAXES, Barbara Spudis De Marigny 2001 19
N. NEW 643 REGULATIONS REDEFINE FIDUCIARY INCOME, Carol Cantrell 2001 15

O. INCOME TAX CONSEQUENCES (AND FIDUCIARY IMPLICATIONS) OF TRUSTS AND ESTATE HOLDING INTERESTS, Mickey Davis. 2001 12
P. WHAT ESTATE PLANNERS NEED TO KNOW ABOUT INCOME TAX MATTERS, Mickey R. Davis 2000 19
Q. STRINGS AND ROPEBURNS REVISITED: ESTATE, GIFT AND INCOME TAX CONSEQUENCES OF GRANTOR RETAINED RIGHTS AND POWERS, William Scanlan 1999 X
R. COORDINATING PAYMENT OF ESTATE TAX AND INCOME TAX AFTER DEATH: ALLOCATION OF ADMINISTRATION EXPENSES, PRESERVING CLAIMS FOR REFUND OF TAX, THE IRD DEDUCTION AND RELATED ISSUES, Barbara Ferguson 1999 N
S. ADMINISTERING THE DISTRIBUTION REQUIREMENT FOR THE TRUST, Randall Lamb 1998 DD
T. PRACTICAL INCOME TAX GUIDANCE ON FORMING, OPERATING AND LIQUIDATING YOUR FLP, Carol Cantrell. . . . . 1998 W
U. INCOME TAXATION OF TRUST AND ESTATES--PRACTICAL GUIDANCE IN ESTATE PLANNING AND ADMINISTRATION, Mickey R. Davis 1996 P
V. THE STATE OF INCOME AND ESTATE TAX IN THE UNITED STATES, Ronald D. Aucutt 1996 I
W. ESTATE PLANNING FOR THE LARGE ESTATE, Kathryn G. Henkel 1995 L
X. PRINCIPAL AND INCOME ALLOCATION FOR TRUSTS AND ESTATES Mickey R. Davis 1994 W
Y. TRUST AND ESTATE INCOME TAXATION FUNDAMENTALS AND BEYOND Carol Warley, C.P.A.. . . . . 1994 V
Z. BASIC INCOME TAX OF BENEFICIARIES, TRUSTS, AND ESTATES, Gary W. Jenson 1993 X
AA. INCOME TAXATION OF TRUSTS AND ESTATES: PLANNING OPPORTUNITIES AND PITFALLS, Mickey R. Davis 1991 R
BB. ALLOCATION OF INCOME AND EXPENSES DURING ADMINISTRATION (FIDUCIARY ACCOUNTING VS. INCOME TAX ACCOUNTING), Gary W. Jenson 1988 P
CC. TRUSTS PLANNING AND INCOME SHIFTING AFTER THE 1986 TAX REFORM ACT: WHAT'S LEFT?, Professor Stanley M. Johanson 1987 S
DD. IRREVOCABLE TRUSTS: DEFENSIVE PLANNING, Dave L. Cornfeld. . . . . 1986 K
EE. TRUSTS AS ASSOCIATIONS, Thomas H. Cantrill 1986 M
FF. DRAFTING TRUSTS FOR S CORPORATION STOCK AND UPDATE ON CURMMEY WITHDRAWAL RIGHTS, Robert H. Kroney 1986 S
GG. TAXATION OF DISTRIBUTIONS: FLYING BLIND WITH THE GOVERNING INSTRUMENT-AN ACCOUNTANT'S PERSPECTIVE, John H. Mullen, CPA 1985 D
HH. INTRAFAMILY INCOME-SHIFTING TECHNIQUES AFTER DICKMAN AND TAX REFORM ACT OF 1984: STRATEGIES TO REPLACE INTEREST-FREE LOANS, Sandra Lynn Perkins 1985 K

VIII. **TRUSTS**

A. NEW 2053 REGULATIONS - HOW MUCH CAN YOU DEDUCT AND WHEN CAN YOU DEDUCT IT?, Harry W. Wolff, Jr. 2010 12
B. INTENTIONALLY DEFECTIVE GRANTOR TRUSTS, Jeffrey N. Myers 2009 20
C. WHEN THE ONLY ONE YOU TRUST IS YOURSELF - DRAFTING AND PLANNING WITH SELF TRUSTEED IRREVOCABLE NONGRANTOR TRUSTS, Toby M. Eisenberg 2008 2
D. GRATs V INTENTIONALLY DEFECTIVE GRANTOR TRUSTS, Jeffrey Myers. 2006 17
E. ESTATE PLANNING FOR THE LOTTERY AND OTHER WINNERS, Karen S. Gerstner 2004 28
F. QPRTs, Jeffrey N. Myers 2004 19
G. UPIA TWINS, Deborah Cox 2004 6
H. SELECTION OF TRUSTEES, Stephen R. Akers 2003 15
I. FUNDING WITH PENSIONS/IRA's, Diane Verdina Perrin. 2003 3
J. TOTAL RETURN TRUSTS, Alvin Golden 2001 25
K. PLANNING AND UTILIZING CHARITABLE TRUSTS, Robert M. Weylandt 2000 20

L. TERMINATING AND MODIFYING IRREVOCABLE TRUSTS, Glenn Karisch 1999 CC
M. FUNDING MARITAL DEDUCTION AND BYPASS TRUSTS, Mickey Davis 1999 BB
N. ADMINISTERING THE DISTRIBUTION REQUIREMENT FOR THE TRUST, Randall Lamb. . . . . 1998 DD
O. OFFSHORE TRUSTS, Duncan Osborne 1997 W
P. ESTATE PLANNING FOR THE MEDIUM SIZED ESTATE—BYPASS TRUST PLANNING AND OTHER GOOD STUFF, Santo Bisignano, Jr. 1996 C
Q. ESTATE PLANNING FOR THE LARGE ESTATE, Kathryn G. Henkel 1995 L

R. TRUST AND ESTATE INCOME TAXATION, FUNDAMENTALS AND BEYOND, Carol Warley, C.P.A. 1994 V
S. PRINCIPAL AND INCOME ALLOCATION FOR TRUSTS AND ESTATES Mickey R. Davis. . . . . 1994 W
D. CRUMMY CRUMMEY TRUST PROBLEMS, Charles E. King 1993 T
E. FUNDING, COMMUNITY PROPERTY, CREDITOR AND OTHER CONCERNS IN THE USE OF REVOCABLE TRUSTS AND SURVIVORSHIP AGREEMENTS, Professor Thomas M. Featherston, Jr. 1992 P
F. IRREVOCABLE TRUSTS: DEFENSIVE PLANNING, Dave L. Cornfeld 1986 K
G. TRUSTS AS ASSOCIATIONS, Thomas H. Cantrill 1986 M
H. USE OF PARTNERSHIPS AS AN ALTERNATIVE TO THE USE OF TRUSTS IN ESTATE PLANNING, S. Stacy Eastland 1986 O
I. DRAFTING TRUSTS FOR S CORPORATION STOCK AND UPDATE ON CRUMMEY WITHDRAWAL RIGHTS, Robert H. Kroney 1986 S

IX. **TAXES AND BUSINESS ENTITIES**

A. **General**

1. S CORP PLANNING UPDATE, Martin Seth Sosolik and Robert Harper Kroney. 2010 11
2. BUSINESS SUCCESSION PLANNING - 2ND GENERATION, Scott H. Carter 2009 32
3. WHAT EVERY ESTATE PLANNER SHOULD KNOW ABOUT SECURITIES LAW, Patrick J. Pacheco 2008 27
4. WHAT THE ESTATE PLANNER NEEDS TO KNOW ABOUT THE MARGIN TAX, Steven D. Moore 2007 12
5. PLANNING FOR OWNERS OF OIL AND GAS INTERESTS, Craig Adams 2006 29
6. THE WHO, WHAT, AND HOW OF 6166, Bethann Eccles. 2006 16
7. REPRESENTING THE PATRIARCH IN FAMILY BUSINESS SUCCESSION, Michael Allen 2006 12
8. BUSINESS ORGANIZATIONS CODE–EFFECT ON ESTATE PLANNING AND ESTATE PLANNERS, Patrick Pacheco 2006 9
9. SECTION 355 REORGANIZATION FOR TRANSFER AND MIGRATING FAMILY BUSINESS, Michael V. Bourland, Marcus Peyton Johnson, James M. Mincey Jr. 2004 18
10. SELLING THE FAMILY BUSINESS, James Mincey.. . . . . 2003 35
11. ISSUES FOR THE RETIRING BUSINESS OWNER, Abigail G. Kampmann 2003 34
12. NAVIGATING THE SINGLE STOCK MONETIZATION & DIVERSIFICATION TAX MAZE: YOU GOTTA KNOW WHEN TO HOLD EM, FOLD EM, COLLAR EM, FORWARD EM,SWAP EM, EXCHANGE EM, MIX BOWL EM, LEVERAGE EM, CRAT EM, CRUT EM, NIMCRUT EM, AND WRAP NIMCRUT EM, S. Stacy Eastland 2002 10
13. BUY SELL AGREEMENTS- UNWINDING NON-FAMILY RELATED BUSINESSES, James M. Mincey, Jr. 2002 22
14. VALUATION DISCOUNTS, VALUE REDUCTION, Charles E. King 2002 13
15. STOCK OPTIONS: A NEW CHALLENGE FOR ESTATE PLANNERS, Carol Cantrell and Robert F. Phelps, Jr. 2000 9
16. EXECUTIVE PLANNING–SPLIT DOLLAR, NON QUALIFIED BENEFIT PLANS, STOCK OPTIONS, RABBI TRUSTS, 2ND TO DIE LIFE INSURANCE POLICY, Panel Discussion, Noel Ice, John Bergner & Charles Wilk. . . . . 1999 P
17. CURRENT DEVELOPMENTS IN FLOW THROUGH ENTITIES, Jay Houren 1999 O
18. TAX RESTRAINTS IN BUSINESS PLANNING, Steve R. Akers 1990 AA

19. TRANSFERRING THE BUSINESS WEALTH OF AN ENTREPRENEUR OR HOW TO KEEP LONDON BRIDGE FROM FALLING DOWN, Robert H. Kroney 1987 B
20. CHARACTERIZATION OF BUSINESS INTERESTS-PROPRIETORSHIPS, CORPORATIONS, AND PARTNERSHIPS, Steve R. Akers 1986 L
21. DRAFTING TRUSTS FOR S CORPORATION STOCK AND UPDATE ON CRUMMEY WITHDRAWAL RIGHTS, Robert H. Kroney. . . . . 1986 S
22. CLOSELY HELD BUSINESS PERKS AND BENEFITS, Gary B. Lawson 1985 F
23. USING CORPORATE RECAPITALIZATION TO ADVANTAGE, John A. Wallace 1985 H

B. **Family Limited Partnerships**

1. FLP PLANNING AND MARITAL DEDUCTION, Stephen R. Akers 2009 18
2. SECTION 2036/ OPTIONS FOR FLP'S THAT "MAY" VIOLATE 2036, S. Stacy Eastland. 2007 18
3. FLP UPDATE IN ESTATE PLANNING, Stephen Akers 2006 11
4. TAX TRAPS IN LIQUIDATING FLPs, Mark Gregen 2005 13
5. FLP UPDATE (AFTER STRANGI), Norman Lofgren 2005 12
6. FLP: TAX WARS: THE CASES, HOT ISSUES AND SUGGESTED STRATEGIES, Norman A. Lofgren 2004 11
7. INCOME TAXATION OF PARTNERSHIP DISTRIBUTION, Carol Cantrell. 2003 17
8. NAVIGATING THE SINGLE STOCK MONETIZATION & DIVERSIFICATION TAX MAZE: YOU GOTTA KNOW WHEN TO HOLD EM, FOLD EM, COLLAR EM, FORWARD EM,SWAP EM, EXCHANGE EM, MIX BOWL EM, LEVERAGE EM, CRAT EM, CRUT EM, NIMCRUT EM, AND WRAP NIMCRUT EM, S. Stacy Eastland 2002 10
9. FAMILY LIMITED PARTNERSHIPS–"THE YEAR OF THE LION"– A LOOK AT CASES DECIDED ON FLP's, Larry Gibbs 2001 37
10. INTERDISCIPLINARY ISSUES INVOLVING LIMITED PARTNERSHIPS AND LIMITED LIABILITY COMPANIES:

    ETHIC CONSIDERATIONS, John Bergner 2001 19
    CREDITOR RIGHTS AND BANKRUPTCY, John Tate 2001 19
    STATE LAW ON PARTNERSHIPS AND LLC, Frank Ruttenberg 2001 19
    INCOME, EMPLOYMENT & FRANCHISE T AXES, Barbara Spudis De Marigny. 2001 19

11. INTERDISCIPLINARY ISSUES IN PROBATE AND FAMILY LAW– WHEN GOOD PLANNING GOES BAD, Stewart Gagnon, Barbara Anderson, Thomas Featherston and Harry Tindall 2001 17
12. AFTER THE TAX JUDGES OPINED: ESTATE PLANNING FLPs ARE STILL EFFECTIVE IF...,Rex Cruse 2000 21
13. DYSFUNCTIONAL FAMILY LIMITED PARTNERSHIPS: LITIGATION ISSUES RELATED TO FLP'S, Dianne Whitehorn Lawter and Jack W Lawter, Jr. 2000 18
14. CURRENT ISSUES: AUDIT AND LITIGATION ISSUES PERTAINING TO THE FORMATION OF FAMILY OWNED AND CONTROLLED PARTNERSHIPS AND LIMITED LIABILITY COMPANIES, Larry W. Gibbs 2000 6
15. CAN WE SPLIT THE BABY?--CREATIVE USES OF SPLIT DOLLAR LIFE INSURANCE IN FLP's AND IN OTHER CONTEXTS, Wendy Farner. . . . . 1998 FF
16. VALUATION ISSUES IN FLP's, Stacy Eastland 1998 X
17. PRACTICAL INCOME TAX GUIDANCE ON FORMING, OPERATING AND LIQUIDATING YOUR FLP, Carol Cantrell 1998 W
18. FREEZE AND LEAKY FREEZE PLANNING UNDER CHAPTER 14, Kathryn Henkel & Stacy Eastland 1997 T
19. TWO CLASS PARTNERSHIPS IN LIGHT OF 2701, Stacy Eastland 1997 S
20. PRACTICAL USES OF FAMILY LIMITED PARTNERSHIPS IN ESTATE PLANNING, J. Thomas Eubank.. . . . . 1995 B
21. FAMILY PARTNERSHIP ALTERNATIVES IN ESTATE PLANNING/ VALUATION CONSIDERATIONS, Charles L. Elliott, CFA, ASA, S. Stacy Eastland 1994 BB
22. PRACTICAL CONSIDERTIONS IN FAMILY LIMITED PARTNERSHIPS, James M. Mincey, Jr. and Michael D. Allen 1993 D
23. USE OF PARTNERSHIPS IN ESTATE PLANNING, S. Stacy Eastland 1987 A

24. USE OF PARTNERSHIPS AS AN ALTERNATIVE TO THE USE OF TRUSTS IN ESTATE PLANNING, S. Stacy Eastland 1986 O

C. **Choice of Entities**

1. CURRENT DEVELOPMENTS IN FLOW THROUGH ENTITIES, Jay Houren 1999 O
2. CHOICE OF ENTITY FOR SMALL BUSINESSES, Charles "Boxy" Hornberger 1998 AA
3. THE BUSINESS ORGANIZATION TOOLBOX--SELECTING THE APPROPRIATE ENTITY FOR ESTATE PLANNING, Charles "Boxy" Hornberger 1996 M
4. AN ESTATE PLANNER'S LOOK AT THE LIMITED LIABILITY COMPANY IS IT A VIABLE ALTERNATIVE TO CORPORATIONS, LIMITED PARTNERSHIPS AND TRUSTS?, Kent H. McMahan.. . . . . 1994 T
5. CHOICE OF BUSINESS ENTITIES: LIMITED LIABILITY PARTNERSHIPS, LIMITED LIABILITY COMPANIES, AND S CORPORATIONS, Charles R. Johnson. . . . 1992 M
6. STRUCTURING THE BUSINESS ENTERPRISE, Michael L. Cook & Carolyn M. Beckett 1990 CC
7. CHOICE OF ENTITIES-BUSINESS, PROFESSIONAL, AND FAMILY CORPORATIONS, AND PARTNERSHIPS: ESTATE BUSINESS AND TAX PLANNING CONSIDERATIONS, Larry W. Gibbs 1989 V
8. CHARACTERIZATION OF BUSINESS INTERESTS-PROPRIETORSHIPS, CORPORATIONS, AND PARTNERSHIPS, Steve R. Akers 1986 L

D. **Buy Sell Agreements**

1. SELLING THE FAMILY BUSINESS, James M. Mincey 2003 35
2. TOOLBOX OF SOPHISTICATED ESTATE PLANNING TECHNIQUES, Marjorie Johnsen Stephens 1998 V
3. BUY-SELL AGREEMENTS, James M. Mincey, Jr. 1992 C
4. THE BUY-SELL AGREEMENT FOR THE 90'S, Michael D. Weinberg & Lawrence Brody 1990 BB
5. BUY-SELL AGREEMENTS FOR CLOSELY HELD CORPORATIONS-THE "BOTTOM LINE" ESTATE PLANNING INSTRUMENT FOR THE CLOSELY HELD BUSINESS OWNER, Stephen R. Akers 1985 G

E. **Valuations**

1. DEFINED-VALUE TRANSFERS, Stephen Taylor Dyer 2008 29
2. FLP UPDATE (AFTER STRANGI), Norman Lofgren 2005 12
3. BUSINESS VALUATION WORKSHOP, Michael V. Bourland Larry W. Gibbs, Robert H. Kroney 1992 V
4. THE DOING AND UNDOING OF BUSINESS VALUATIONS, James O. Roberts. . . . . 1989 AA

X. **DEFERRED COMPENSATION (IRAs, PENSIONS ETC)**

A. QUALIFIED PLANS & IRA'S: TOP TEN LIST, Karen S. Gerstner.. . . . . 2010 17
B. STRUCTURING TRUSTS (INCLUDING SNTS) AS RECIPIENTS OF QUALIFIED PLANS AND IRAS, Alvin J. Golden 2009 29
C. THE PROS AND CONS OF THE BYPASS TRUST AS IRA BENEFICIARY, Karen Gerstner 2006 31
D. PLANNING CHALLENGES: RETIREMENT PLAN/IRA BENEFICIARY DESIGNATIONS IN SECOND MARRIAGE SITUATIONS, Karen Gerstner 2005 24
E. A SEA CHANGE IN THE TAXATION OF DEFERRED COMPENSATION– THE NEW SECTION 409A RULES, Donald Jansen 2005 14
F. EMPLOYEE BENEFITS AND ESTATE PLANNING, R. Eric Viehman. 2004 21
G. FUNDING WITH PENSIONS/ IRA's, Diane Verdina Perrin 2003 3
H. RETIREMENT UPDATE AFTERMATH OF ENRON 45, Noel C. Ice 2002 35
I. QUALIFIED PLANS AND IRAs, Noel Ice 2001 33
J. YOU HAVE NAMED A TRUST AS A BENEFICIARY OF QUALIFIED PLANS /IRAs–NOW WHAT?, Karen Gerstner 2001 16

K. EXCESS AND DEFERRED COMPENSATION ISSUES, Taylor Boone. 2001 13
L. WHAT YOU ABSOLUTELY, POSITIVELY HAVE TO KNOW ABOUT QUALIFIED PLAN BENEFITS AND IRA'S, William D. Pargaman 2000 29
M. STOCK OPTIONS: A NEW CHALLENGE FOR ESTATE PLANNERS, Carol Cantrell and Robert F. Phelps, Jr. 2000 9
N. EXECUTIVE PLANNING–SPLIT DOLLAR, NON QUALIFIED BENEFIT PLANS, STOCK OPTIONS, RABBI TRUSTS, 2ND TO DIE LIFE INSURANCE POLICY, Panel Discussion, Noel Ice, John Bergner & Charles Wilk 1999 P
O. ROTH IRAs, Noel Ice 1999 I
P. IRA RETIREMENT PLANS, *BOGGS* , Eric Viehman. . . . . 1998 M
Q. PENSION PROVISIONS IN SBPA 96, Noel Ice 1997 D
R. TIPS AND PRACTICALITIES OF QUALIFIED PLANS, Noel Ice 1996 B
S. RETIREMENT PLANNING: A PRACTICAL GUIDE TO MAKING TOUGH CHOICES, Marcia Chadwick Holt 1995 X
T. BENEFICIARY DESIGNATIONS-PENSION PLANS, IRA'S, ERISA Alvin J. Golden & Noel C. Ice 1994 D
U. ESTATE PLANNING FOR DISTRIBUTIONS FROM QUALIFIED PLANS AND IRAS, Noel C. Ice. . . . . 1993 Y
V. THE QUALITY OF MERCY IS NOT STRAINED: A LOOK AT THE RAIN FALLING ON QUALIFIED PLANS IN BANKRUPTCY, Alvin J. Golden 1992 E
W. CHOICE OF BUSINESS ENTITIES: LIMITED LIABILITY PARTNERSHIPS, LIMITED LIABILITY COMPANIES, AND S CORPORATIONS Charles R. Johnson 1992 M
X. EMPLOYEE BENEFITS (2 Articles), Edgar M. Duncan & Noel C. Ice 1991 Q
Y. QUALIFIED PLAN BENEFITS, Alvin J. Golden 1990 E
Z. QUALIFIED PLANS-SELECTION AND DISTRIBUTION, Edgar M. Duncan & Mary M. Potter.. . . . . 1989 N
AA. DOES SECTION 89 BELONG IN THE TOOL BOX, Sue Culpepper Ortman 1989 Z
BB. WHEN WORLDS COLLIDE...AN ESTATE PLANNER LOOKS AT QUALIFIED PLAN BENEFITS, Alvin J. Golden 1988 B
CC. PLANNING FOR THE EXECUTIVE, William Scanlan, Jr. 1987 C
DD. QUALIFIED EMPLOYEE BENEFITS, Noel C. Ice 1987 D
EE. DISTRIBUTION PLANNING FOR QUALIFIED BENEFIT PLANS, Michael L. Graham. . . . . 1986 P
FF. CLOSELY HELD BUSINESS PERKS AND BENEFITS, Gary B. Lawson 1985 F

XI. TAX CONSIDERATIONS IN PROBATE AND TRUST LITIGATION

A. REVIEW OF ISSUES WITH UNFUNDED BYPASS TRUSTS, Mickey Davis 2006 34
B. TAX CONSIDERATIONS IN SETTLEMENT & JUDGMENTS, Mickey Davis & Sarah Pacheco 2005 15
C. TO REPORT OR NOT TO REPORT: DUTY TO FILE SUPPLEMENTAL INFORMATION FOR FORM 706 AND AN UPDATE ON FORM 709, Scott Carter 2004 7
D. TERMINATING AND MODIFYING IRREVOCABLE TRUSTS, Glenn Karisch.. . . . . 1999 CC
E. TAX ASPECTS OF FAMILY SETTLEMENT AGREEMENTS, Linda Kelly 1998 Y
F. FAMILY SETTLEMENT AGREEMENTS AND THEIR TAX CONSE-QUENCES, Linda Kelly 1996 Q
G. TAX ASPECTS OF WILL CONTEST LITIGATION, S. Jody Helman 1994 N
B. TAX CONSIDERATIONS IN PROBATE AND TRUST LITIGATION, Karen S. Gertsner 1991 S

XII. TAX CONSIDERATION IN ADMINISTERING AN ESTATE

A. REVIEW OF ISSUES WITH UNFUNDED BYPASS TRUSTS, Mickey Davis 2006 34
B. TAX ALLOCATIONS CLAUSE, Stephanie Donaho 2006 27
C. CIRCULAR 230, Willam R. "Trey" Cousins 2006 6
D. POST MORTEM TAX PLANNING, Stephen Akers 2005 11
E. PREPARING AND FILING THE FORM 706: WHO, WHAT , HOW, WHEN AND WHERE, Glen Yale. 2005 10

F. TO REPORT OR NOT TO REPORT: DUTY TO FILE SUPPLEMENTAL INFORMATION FOR FORM 706 AND AN UPDATE ON FORM 709, Scott Carter 2004 7
G. PRIVATE LETTER RULING REQUEST, Alexander E. Nakos 2002 14
H. COORDINATING PAYMENT OF ESTATE TAX AND INCOME TAX AFTER DEATH: ALLOCATION OF ADMINISTRATION EXPENSES, PRESERVING CLAIMS FOR REFUND OF TAX, THE IRD DEDUCTION AND RELATED ISSUES, Barbara Ferguson 1999 N
I. THE MULTIFACETED ESTATE ADMINISTRATION, William Miller 1998 EE
J. ESTATE ADMINISTRATION--A SUMMARY OF PRACTICAL TAX PLANNING IDEAS, Steve Akers .. . . 1998 D
K. THE ESTATE TAX CONTROVERSY-PREPARATION OF THE ESTATE TAX RETURN AND BEYOND, Lawrence M. Bass 1995 Y
L. TAX APPORTIONMENT CLAUSES: DISPOSITIVE PROVISIONS IN DISGUISE, Thomas E. Berry 1994 A
M. TAX APPORTIONMENT, Stephanie Elbers Donahoe 1992 F
N. POST-MORTEM TRANSFER TAX PLANNING, Malcolm A. Moore 1992 G
O. EQUITABLE ADJUSTMENTS--CAN IT HAPPEN HERE?, Ed Schlesinger. . . . . 1990 V
P. APPORTIONMENT & ABATEMENT: DEBTS, TAXES & EXPENSES, James A. Carter 1990 W
Q. TAX APPORTIONMENT, Steve R. Akers 1989 Y
R. ALLOCATION OF DEBTS AND TAXES, Denny O. Ingram 1987 J

XIII. **TAX PROCEDURES AND LITIGATION**

A. IRS PROCEDURES FOR EXAMINATIONS, APPEALS, AND TRIALS - LOOKING BACK FROM THE OUTSIDE, Steven J. Tackett and Gerald L. Brantley 2010 13
B. EXAMINATION OF FEDERAL ESTATE TAX RETURNS & APPEALS, Steven J. Tackett. . . . 2007 33
C. THE WHO, WHAT, AND HOW OF 6166, Bethann Eccles 2006 16
D. CIRCULAR 230, Willam R. “Trey” Cousins 2006 6
E. PREPARING AND FILING THE FORM 706: WHO, WHAT , HOW, WHEN AND WHERE, Glen Yale 2005 10
F. TO REPORT OR NOT TO REPORT: DUTY TO FILE SUPPLEMENTAL INFORMATION FOR FORM 706 AND AN UPDATE ON FORM 709, Scott Carter 2004 7
G. ATTORNEY-CLIENT STANDARDS OF CONDUCT & THE IRS, Charles M. Meadows. 2003 19
H. TAX UPDATE, Stanely M. Johanson 2002 15
I. MANAGING THE TRANSFER TAX EXAMINATION, Steve Tackett 2001 14
J. VALUING ASSETS FOR FORM 706: PUTTING “GROSS” IN “GROSS ESTATE,” Glen Yale. 1999 W
K. TAX LITIGATION, Donald Lan.. . . . . 1999 M
L. THE ESTATE TAX CONTROVERSY-PREPARATION OF THE ESTATE TAX RETURN AND BEYOND, Lawrence M. Bass 1995 Y
M. FEDERAL AND TEXAS TAX PROCEDURES: THE BASIC THE ESTATE PLANNER AND PROBATE LAWYER SHOULD KNOW ABOUT LIENS, EXTENSIONS, LIMITATIONS, AND PERSONAL LIABILITY OF EXECUTORS AND TRANSFEREES, Thomas H. Cantrill 1995 R
N. COMMON 706 PROBLEMS, Cynthia Camuel 1993 Z
O. FORM 706 AND MARITAL TRUST WORKSHOP Thomas E. Berry, Richard R. Cruse, James L. Gulley 1992 L
P. THE IRS AS A CLAIMANT, William D. Elliott. . . . . 1990 K
Q. TAXATION OF DISTRIBUTIONS: FLYING BLIND WITH THE GOVERNING INSTRUMENT-AN ACCOUNTANT'S PERSPECTIVE, John H. Mullen, CPA 1985 E

XIV. **LIFE ESTATES**:
A. QPRTs, Jeffrey N. Myers 2004 19
B. DRAFTING NEW USES FOR AN OLD TECHNIQUE- THE LIFE ESTATE, Donald J. Malouf 1986 R

XV. **STATE TAXES:**
A. MIGRATING CLIENTS AND ASSETS - INHERITANCE TAX, Michael L. Graham 2008 17
B. FLP’s vs. LLC’s FROM A MARGIN TAX PERSPECTIVE, Gene Wolf 2008 16
C. STATE DEATH TAXES: INHERITANCE TAXES IN OTHER STATES, James Bass 1997 O

Part 2: NONTAX

I. KEYNOTE

A. LUNCHEON PRESENTATION: LEGAL WRITING FOR THE REWIRED BRAIN, Robert B. Dubose 2010 5
B. LUNCHEON PRESENTATION: IMAGES OF LAWYERS IN POPULAR CULTURE, Nancy B. Rapoport 2009 16
C. STATUS OF THE PROFESSION, William P. Cantwell 1991 A
D. WHERE ARE WE GOING?, J. Thomas Eubank, Jr. 1989 E

II. CURRENT DEVELOPMENTS

A. Case Law

1. CASE LAW UPDATE, Gerry W. Beyer 2010 24
2. CASE LAW UPDATE, Gerry W. Beyer 2009 12
3. CASE LAW UPDATE, Gerry W. Beyer. 2008 3
4. CASE LAW UPDATE, Gerry W. Beyer 2007 1
5. CASE LAW UPDATE, Gerry W. Beyer 2006 1
6. CASE LAW UPDATE, Gerry W. Beyer 2005 1
7. CASE LAW UPDATE, Gerry W. Beyer 2004 1
8. CASE LAW UPDATE, Gerry W. Beyer. 2003 1
9. CASE LAW UPDATE, Gerry W. Beyer 2002 1
10. TEXAS CASE LAW UPDATE, Gerry W. Beyer 2001 2
11. TEXAS CASE LAW UPDATE, Gerry W. Beyer 2000 1
12. TEXAS CASE LAW UPDATE, Michael Cenatiempo 1999 B
13. TEXAS CASE LAW UPDATE, Gerry W. Beyer. . . . . 1998 A
14. TEXAS CASE LAW UPDATE, Gerry W. Beyer 1996 Y
15. TEXAS CASE LAW UPDATE, Professor Gerry W. Beyer 1994 K
16. CASE LAW UPDATE, Professor Gerry W. Beyer 1993 S
17. LEGISLATIVE AND CASE DEVELOPMENTS Honorable Will Ford Hartnett 1992 A
18. INTESTACY/WILLS/TRUST CASE UPDATE, Professor Gerry W. Beyer. . . . . 1991 F
19. CURRENT DEVELOPMENTS IN PROBATE AND TRUST PRACTICE, Tom Normand 1989 D
20. CURRENT DEVELOPMENTS IN INSURANCE, Don E.. Fizer 1989 M
21. DEVELOPMENT IN PROBATE AND TRUST LAW WITH EMPHASIS ON APPORTIONMENT AND ABATEMENT, Thomas N. Crowell 1988 V
22. CURRENT DEVELOPMENTS IN STATE PROBATE AND TRUST LAW, Noel C .Ice 1986 N

B. Legislative

1. LEGISLATIVE UPDATE, William Pargaman & Glenn M. Karisch. 2009 1
2. PROBATE CODE RECODIFICATION PROJECT OVERVIEW, Barbara McComas Anderson & Thomas M. Featherston, Jr. 2008 4
3. LEGISLATIVE UPDATE, Glenn M. Karisch 2007 10
4. LEGISLATIVE UPDATE, Glenn M. Karisch 2005 2
5. LEGISLATIVE UPDATE, Jerry Frank Jones 2003 2
6. STATE LEGISLATIVE UPDATE, Jerry Frank Jones. 2001 3
7. STATE LEGISLATIVE UPDATE, Jerry Frank Jones 1999 E
8. STATE LEGISLATIVE UPDATE, Jerry Frank Jones 1997 B
9. GUARDIANSHIP UPDATE, Linda C. Goehrs & Sharon Brand Gardner 1995 G
10. LEGISLATIVE UPDATE, Alvin J. Golden. . . . . 1995 D
11. TEXAS LEGISLATIVE UPDATE, Alvin J. Golden 1993 C
12. LEGISLATIVE AND CASE DEVELOPMENTS Honorable Will Ford Hartnett 1992 A
13. LEGISLATIVE UPDATE, Frank N. Ikard 1991 D
14. LEGISLATIVE DEVELOPMENTS, Michael J. Cenatiempo 1989 O

III. **ISSUES WITH OTHER STATES**

A. TRUST PROTECTORS, Marjorie Stephens 2006 28
B. COMMON LAW TO COMMUNITY PROPERTY–ESTATE PLANNING FOR THE MIGRATING CLIENT, Sandy Bisgnano, Jr. 2006 3
C. INHERITANCE TAXES IN OTHER STATES, James Bass 1997 O
D. "...EXCEPT IN LOUISIANA", Gerald Le Van 1988 N
E. PERFECTING TITLE AND TRANSFERRING REAL PROPERTY OUT OF THE STATE, Allen K. Cummings & Robert H. Dawson 1986 B

IV. **JURISDICTION**

A. JURISDICTION AND VENUE FOR WILL AND TRUST DISPUTES, M. Keith Branyon 2007 21
B. JURISDICTION ISSUES, Judge Russell Austin. . . . . 1999 T
C. JURISDICTION AND STRUCTURE OF PROBATE COURTS, Judge Don Windle 1997 E
D. WHEN WARDS DIVORCE--A QUESTION OF JURISDICTION, Carole Clark 1996 T
E. JURISDICTION, Professor Helen B. Jenkins 1993 Q
F. JURISDICTION OF PROBATE COURT, Honorable Kenneth Pat Gregory 1990 G
G. PROBATE JURISDICTION (INCLUDING JOINT TENANCY BANK ACCOUNTS), Jack M. Kinnebrew. . . . . 1987 Q
H. JURISDICTION AND LITIGATION IN PROBATE PRACTICE, Frank N. Ikard, Jr. 1985 T

V. **INTESTACY**

A. TO HEIR OR NOT TO HEIR - THAT IS THE QUESTION, Helen B. Wils 2010 14
B. THE UNEXPECTED FAMILY: LITIGATING THE DETERMINATION OF A PURPORTED COMMON LAW SPOUSE, Hon. Ruth Ann Stiles 2006 26
C. BLOOD WILL OUT: THE USE OF DNA EVIDENCE IN TEXAS ESTATE PROCEEDINGS , Hon. Steve King.. . . . . 2006 15
D. WHO'S YOUR DADDY? WHO'S YOUR MAMA? Ellen Yarrell 2001 20
E. INTESTACY/WILLS/TRUSTS CASE UPDATE, Professor Gerry W. Beyer 1991 F
F. WHO ARE YOUR DESCENDANTS?-ADOPTIONS, HALF-BLOODS, SURROGATES, ETC., Barbara B. Ferguson 1987 F

VI. **NON PROBATE ASSETS (Joint Accounts etc)**

A. NON PROBATE ASSETS - JTWROS (JOINT TENANTS WITH RIGHT OF SURVIVORSHIP), W. Cameron McCulloch, Jr. 2009 34
B. COMMUNITY PROPERTY AND NON-PROBATE DISPOSITIONS, Prof. Thomas M. Featherston, Jr. 2003 27
C. JOINT TENANCY WITH RIGHT OF SURVIVORSHIP ISSUE, W. Cameron McCulloch 2003 23
D. STOCK OPTIONS: A NEW CHALLENGE FOR ESTATE PLANNERS, Carol Cantrell and Robert F. Phelps, Jr. 2000 9
E. THE MULTIFACETED ESTATE ADMINISTRATION (Includes Non Probate Assets), William Miller.. . . . . 1998 EE
F. MYRIAD OF ISSUES INVOLVING MULTI-PARTY BANK ACCOUNTS, POWER OF ATTORNEY, David Bakutis 1997 L
G. MULTIPLE PARTY ACCOUNTS: MULTIPLE RISKS FOR ESTATE PLANNING ATTORNEYS AND THEIR CLIENTS, Karen S. Gerstner 1995 I
H. MULTIPLE PARTY ACCOUNTS, Robert N. Virden 1994 C
I. FUNDING, COMMUNITY PROPERTY, CREDITOR AND OTHER CONCERNS IN THE USE OF REVOCABLE TRUSTS AND SURVIVORSHIP AGREEMENTS, Professor Thomas M Featherston, Jr. 1992 P
J. RECENT COMMUNITY PROPERTY DEVELOPMENTS INCLUDING RIGHTS OF SURVIVORSHIP AND UNIFORM PRENUPTIAL ACT, Professor Thomas M. Featherston, Jr.. . . . . 1988 I

K. PROBATE JURISDICTION (INCLUDING JOINT TENANCY BANK ACCOUNTS), Jack M. Kinnebrew 1987 Q
L. MULTI-PARTY ACCOUNTS UNDER CHAPTER XI OF THE TEXAS PROBATE CODE, Steven J. Tackett 1985 S

VII. **PROBATE ALTERNATIVES**

A. INDEPENDENT ADMINISTRATION FROM START TO FINISH, M. Keith Branyon 2000 7
B. ALTERNATIVE ADMINISTRATION AND PROBATE TECHNIQUES Honorable Polly Jackson Spencer 1994 B
C. ALTERNATIVE PROCEDURES TO PROBATE, Noel C. Ice 1988 J

VIII. **PROBATE ADMINISTRATION**

A. **General**:

1. INTERNATIONAL ISSUES IN ESTATE ADMINISTRATION, R. Glenn Davis 2010 26
2. ADDRESSING COMPLEX PROBATE ISSUES, M. Keith Branyon. 2009 3
3. JOINT FAMILY PROBATE, Mary C. Burdette & Paula K. Larsen 2008 32
4. PROBATE CODE RECODIFICATION PROJECT OVERVIEW, 2008 4
Barbara McComas Anderson & Thomas M. Featherston, Jr.
5. COMMON MISTAKES OF FIDUCIARIES IN ADMINISTRATION OF GUARDIANSHIPS AND ESTATES, R. Dyann McCully & Judge Polly Jackson Spencer 2007 30
6. BLOOD WILL OUT: THE USE OF DNA EVIDENCE IN TEXAS ESTATE PROCEEDINGS , Hon. Steve King 2006 15
7. ADMINISTERING THE PLANS WE CREATE, David C. Bakutis, Douglas Hartzell & Lisa Jameson.. . . . . 2005 7
8. COMMUNITY ADMINISTRATION, John L. Hopwood 2003 29
9. AD LITEM REPRESENTATION INCLUDING CONTESTED MATTERS, Gus G. Tamborello 2002 33
10. TEN UNANSWERED QUESTIONS IN PROBATE AND GUARDIANSHIP, W. Cameron McCullough, Jr. 2001 6
11. TEN UNANSWERED QUESTIONS IN PROBATE, Darlene Payne Smith 2000 30

B. **Spouses & Marital Property**

1. A HANDBOOK FOR THE LAWYER REPRESENTING THE SURVIVING SPOUSE FOLLOWING THE DECEDENT'S DEATH, Thomas M. Featherston, Jr.. . . . . 2010 6
2. HANDLING THE DEBTS OF THE SURVIVING SPOUSE IN THE ESTATE OF THE DECEASED SPOUSE, Thomas M. Featherston, Jr. 2009 2
3. HOT TOPICS: MARITAL PROPERTY ISSUES AFFECTING THE TRUSTS AND ESTATES PRACTICE, Thomas M. Featherston, Jr. 2008 36
4. ADMINISTRATION WITH A SURVIVING SPOUSE, Robert S. Macintyre 2007 2
5. PROTECTING THE SURVIVING SPOUSE, Glen Karisch 2006 33
6. THE UNEXPECTED FAMILY: LITIGATING THE DETERMINATION OF A PURPORTED COMMON LAW SPOUSE, Hon. Ruth Ann Stiles.. . . . . 2006 26
7. FEDERAL PREEMPTION OF TEXAS MARITAL PROPERTY LAW, Thomas G. Featherson, Jr. 2006 2
8. WHAT A SPOUSE CAN DO TO UNILATERALLY PROTECT THAT SPOUSE'S 'ESTATE' FROM THE OTHER SPOUSE AND THE OTHER SPOUSES'S CREDITORS AND HEIRS, Thomas M. Featherston Jr. 2004 9
9. COMMUNITY ADMINISTRATION, John L. Hopwood 2003 29
10. COMMUNITY PROPERTY AND NON-PROBATE DISPOSITIONS, Prof. Thomas M. Featherston, Jr. 2003 27
11. CONFLICT ISSUES BETWEEN SPOUSE, Janis Reinken 2003 16
12. TRACING AFTER DEATH. DAD'S DEAD, HE DIDN'T FUND MOM'S TRUST AND STEPMOM WANTS IT ALL, Donald F. Carnes; Kenneth Huff CPA 2002 18

13. COMMUNITY PROPERTY ISSUES AFFECTING THE ESTATE PRACTICE, INCLUDING CLAIMS FOR ECONOMIC CONTRIBUTION AND FRAUD ON THE COMMUNITY, Thomas M. Featherston, Jr. 2002 16
14. REIMBURSEMENT: A NEW LOOK FOR THE MILLENNIUM, Professor Thomas M. Featherston, Jr. 2000 4
15. THE FAMILY LAW PARTNERSHIP–MARITAL PROPERTY AND ETHICAL CONSIDERATIONS, Bernard Jones 1999 C
16. THE MULTIFACETED ESTATE ADMINISTRATION (Includes the Incompetent Spouse), William Miller 1998 EE
17. THE GREAT DEBATE: WHEN WORLDS COLLIDE, Stewart Gagnon & Thomas Featherston. . . . . 1998 Z
18. ESTATE PLANNING TO PROTECT THE SURVIVING SPOUSE, Glenn Karisch 1997 Q
19. SELECTED MARITAL ISSUES IN THE ESTATE PRACTICE Thomas M. Featherston, Jr. 1996 J
20. ADMINISTRATION OF COMMUNITY PROPERTY AFTER A SPOUSE'S DEATH, Frank N. Ikard, Jr. 1996 BB
21. SPECIAL RIGHTS OF SURVIVING SPOUSE-HOMESTEAD, EXEMPT PROPERTY, AND THE FAMILY ALLOWANCE, Roger L. Beebe 1994 I
22. MARITAL PROPERTY-CHARACTERIZATION ISSUES AT DIVORCE AND DEATH, Linda L. Kelly and Kenneth D. Fuller. . . . . 1993 A
23. LIABILITY OF THE SURVIVING SPOUSE, Deborah Cox 1992 H
24. MANAGEMENT, ADMINISTRATION AND DISPOSITION OF MARITAL PROPERTY, Professor Thomas M. Featherston 1990 D
25. THE WIDOW'S ELECTION, Brainerd S. Parrish 1989 I
26. HOMESTEAD, FAMILY ALLOWANCE, AND RIGHTS AND LIABILITIES OF SURVIVING SPOUSE, Roger L. Beebe 1985 M

C. **Ad Litems**

1. AD LITEMS, Sharon Gardner 1992 R
2. AD LITEMS: APPOINTMENTS, DUTIES, AND PROBLEMS: HANDLING UNCONTESTED MATTERS, Caroline W. Jackson 1990 H
3. AD LITEMS: APPOINTMENTS, DUTIES, AND PROBLEMS: HANDLING CONTESTED MATTERS, Sharon B. Gardner 1990 I

D. **Management of Fiduciary Assets**,

1. WHAT'S IN THE ATTIC? HELPING YOUR CLIENT AND THEIR FAMILIES UNDERSTAND AND PRESERVE THEIR HIDDEN TREASURERS, Don Carleton 2005 27
2. TRACING AFTER DEATH. DAD'S DEAD, HE DIDN'T FUND MOM'S TRUST AND STEPMOM WANTS IT ALL, Donald F. Carnes; Kenneth Huff CPA 2002 18
3. HANDBOOK FOR THE FIDUCIARY–ADVISING AND COUNSELING EXECUTORS AND TRUSTEES, Kate Hopkins 2001 34
4. TOTAL RETURN TRUSTS, Alvin Golden 2001 25
5. INTERDISCIPLINARY ISSUES IN PROBATE AND FAMILY LAW– WHEN GOOD PLANNING GOES BAD, Stewart Gagnon, Barbara Anderson, Thomas Featherston and Harry Tindall 2001 17
6. RISK MANAGEMENT FOR THE TRUSTEE IN MAKING DISCRETIONARY DECISIONS (HSME POWERS, "BEST INTEREST" POWERS, INVESTMENT ALLOCATIONS), Michael J. Cenatiempo 1995 W
7. MANAGEMENT OF FIDUCIARY ASSETS, Dennis I. Belcher 1990 X

E. **Representing the Individual Executor/Trustee**

1. COMPENSATION, Hon. Georgia Lee Akers 2009 15
2. FIDUCIARY COMPENSATION, Georgia Lee Akers. 2003 24
3. HANDBOOK FOR THE FIDUCIARY–ADVISING AND COUNSELING EXECUTORS AND TRUSTEES, Kate Hopkins 2001 34
4. SHOW ME THE MONEY: FIDUCIARY COMPENSATION–HOW TO GET THE PR PAID, HOW MUCH DO THEY GET AND HOW DO I GET PAID, Georgia Akers 2001 32

5. TOTAL RETURN TRUSTS, Alvin Golden 2001 25
6. THE MULTIFACETED ESTATE ADMINISTRATION, William Miller 1998 EE
7. SHOW CAUSE, SURCHARGE AND CONTEMPT PROCEEDINGS IN THE PROBATE COURT, Jim Guiberteau. . . . . 1993 R
8. FIDUCIARY LIABILITY, Jack W. Lawter, Jr. 1993 K
9. FIDUCIARY LITIGATION, Tom Alan Cunningham 1992 U
10. FIDUCIARY LIABILITY, Stephanie Elbers Donaho 1988 C
11. REPRESENTING THE INDIVIDUAL EXECUTOR/TRUSTEE, Lawrence J. Pirtle 1988 F

F. **Independent Administration**: INDEPENDENT ADMINISTRATION FROM START TO FINISH, M. Keith Branyon 2000 7

G. **Dependent Administration**,

1. COMPENSATION, Hon. Georgia Lee Akers 2009 15
2. STATUTE OF LIMITATIONS IN PROBATE AND TRUST LITIGATION, Helen Wills 1999 U
3. PROBLEMS IN DEPENDENT ADMINISTRATION AS SEEN FROM BOTH SIDES OF THE BENCH, Honorable David D. Jackson & Edward V. Smith III 1985 P

H. **Debts, Taxes Reimbursement, and Claims**

1. HANDLING THE DEBTS OF THE SURVIVING SPOUSE IN THE ESTATE OF THE DECEASED SPOUSE, Thomas M. Featherston, Jr. 2009 2
2. ADAPTING TO THE 2005 AMENDMENTS TO THE BANKRUPTCY CODE-PROTECTING YOUR CLIENTS AND THOSE THEY LOVE FROM LIVING AT THE MEDIAN, Phil Lindquist. 2006 4
3. CREDITOR'S ISSUES - INSOLVENCY AND THE ESTATE, Nathan K. Griffin 2004 27
4. DEALING WITH INSOLVENT ESTATE, Michael Keith Branyon 2002 23
5. COMMUNITY PROPERTY ISSUES AFFECTING THE ESTATE PRACTICE, INCLUDING CLAIMS FOR ECONOMIC CONTRIBUTION AND FRAUD ON THE COMMUNITY, Thomas M. Featherston, Jr. 2002 16
6. TOTAL RETURN TRUSTS, Alvin Golden 2001 25
7. INTERDISCIPLINARY ISSUES INVOLVING LIMITED PARTNERSHIPS AND LIMITED LIABILITY COMPANIES: CREDITOR RIGHTS & BANKRUPTCY, John Tate.. . . . . 2001 19
8. CREDITORS CLAIMS IN INDEPENDENT, DEPENDENT AND GUARDIANSHIP ESTATES, Mark Schreiber 2001 5
9. HOMESTEAD AFTER HOME EQUITY, Steven C. Haley 2000 5
10. STATUTE OF LIMITATIONS IN PROBATE AND TRUST LITIGATION, Helen Wills 1999 U
11. COORDINATING PAYMENT OF ESTATE TAX AND INCOME TAX AFTER DEATH: ALLOCATION OF ADMINISTRATION EXPENSES, PRESERVING CLAIMS FOR REFUND OF TAX, THE IRD DEDUCTION AND RELATED ISSUES, Barbara Ferguson 1999 N
12. WHO TRUMPS WHO? CLAIMS IN PROBATE COURT, Jeannine C. Flynn. . . . . 1999 F
13. WHEN THE DEBTOR IS MARRIED, INCAPACITATED, DECEASED OR THE SETTLOR, TRUSTEE OR BENEFICIARY, Prof. Thomas M. Featherston 1997 J
14. HOW TO HANDLE THE INSOLVENT ESTATE, Joseph Horrigan 1997 K
15. CLAIMS PROCEDURES IN PROBATE AND GUARDIANSHIP, C. Boone Schwartzel 1996 D
16. HANDLING CLAIMS AGAINST DECEDENT'S ESTATES, Professor Thomas M. Featherston, Jr. 1995 J
17. ASSET PROTECTION FOR ESTATE PLANNERS, Sam Hildebrand. . . . . 1995 H
18. CREDITOR'S CLAIMS WITH A SPECIAL EMPHASIS ON INDEPENDENT ADMINISTRATION, Joseph S. Horrigan 1993 M
19. LIABILITY OF THE SURVIVING SPOUSE, Deborah Cox 1992 H
20. CREDITORS' CLAIMS REVISITED, Thomas O. Barton 1990 J
21. APPORTIONMENT AND ABATEMENT: DEBTS, TAXES, AND EXPENSES, James A. Carter 1990 W

22. MARITAL PROPERTY--CHARACTERIZATION, REIMBURSEMENT, MANAGEMENT, AND LIABILITY ISSUES, Professor Thomas M. Featherston, Jr.. . . . . . 1989 F
23. THE PERSONAL REPRESENTATIVE VS. THE SECURED LENDER, C. Boone Schwartzel & Steven R. Biegel 1989 U
24. TAX APPORTIONMENT, Steve R. Akers 1989 Y
25. CREDITOR PROBLEMS FROM THE ESTATE'S VIEWPOINT, Joseph S. Horrigan 1988 O
26. ALLOCATION OF INCOME AND EXPENSES DURING ADMINISTRATION (FIDUCIARY ACCOUNTING VS. INCOME TAX ACCOUNTING), Gary W. Jenson 1988 P
27. PROTECTING YOUR CLIENT AND YOURSELF IN HARD TIMES, Stephen J. Helman. . . . . 1988 Q
28. DEVELOPMENT IN PROBATE AND TRUST LAW WITH EMPHASIS ON APPORTIONMENT AND ABATEMENT, Thomas N. Crowell 1988 V
29. ALLOCATION OF DEBTS AND TAXES, Denny O. Ingram 1987 J
30. PROTECTING ASSETS, Rhonda H. Brink 1986 H
31. COMMUNITY PROPERTY VS. SEPARATE PROPERTY-CHARACTERIZATION, REIMBURSEMENT AND PLANNING AFTER JENSEN, Edwin W. Davis 1985 N

I. **Community Property**

1. A HANDBOOK FOR THE LAWYER REPRESENTING THE SURVIVING SPOUSE FOLLOWING THE DECEDENT'S DEATH, Thomas M. Featherston, Jr. 2010 6
2. HANDLING THE DEBTS OF THE SURVIVING SPOUSE IN THE ESTATE OF THE DECEASED SPOUSE, Thomas M. Featherston, Jr. 2009 2
3. HOT TOPICS: MARITAL PROPERTY ISSUES AFFECTING THE TRUSTS AND ESTATES PRACTICE, Thomas M. Featherston, Jr. 2008 36
4. ADMINISTRATION WITH A SURVIVING SPOUSE, Robert S. Macintyre. 2007 2
5. TRUST & ESTATE PERSPECTIVES OF TEXAS MARITAL PROPERTY LAW, Thomas Featherston 2005 9
6. COMMUNITY PROPERTY AND NON-PROBATE DISPOSITIONS, Prof. Thomas M. Featherston, Jr. 2003 27
7. COMMUNITY PROPERTY ISSUES AFFECTING THE ESTATE PRACTICE, INCLUDING CLAIMS FOR ECONOMIC CONTRIBUTION AND FRAUD ON THE COMMUNITY, Thomas M. Featherston, Jr. 2002 16
8. SHOW CAUSE, CONTEMPT, SURCHARGE, Edward V. Smith 2002 7
9. MARITAL PROPERTY CHARACTERIZATION OF INTERESTS IN TRUSTS, INCLUDING DISTRIBUTED AND UNDISTRIBUTED INCOME, Professor Thomas M. Featherston, Jr.. . . . . 1999 G
10. MARITAL PROPERTY--CHARACTERIZATION, REIMBURSEMENT, MANAGEMENT, AND LIABILITY ISSUES, Professor Thomas M. Featherston, Jr. 1989 F
11. COMMUNITY PROPERTY TRACING CONCEPTS, Stewart Gagnon, Robert S. Hoffman & Lisa D. Harbour 1989 G
12. COMMUNITY PROPERTY WITH RIGHT OF SURVIVORSHIP, Kathryn G. Henke 1989 H
13. COMMUNITY PROPERTY VS. SEPARATE PROPERTY--CHARACTER-IZATION, REIMBURSEMENT AND PLANNING AFTER JENSEN, Edwin W. Davis 1985 N

J. **Sureties**:

1. SHOW CAUSE, CONTEMPT, SURCHARGE, Edward V. Smith 2002 7
2. SURETY RESPONSIBILITY AND LIABILITY,Robert D. Reed & Edward V. Smith III 1994 O

K. **Termination:**

1. RELEASES AND RECEIPTS AND JUDICIAL ACCOUNTING, Joyce W. Moore 2008 37
2. ADMINISTERING THE DISTRIBUTION REQUIREMENT FOR THE TRUST, Randall Lamb 1998 DD
3. PITFALLS FOR FIDUCIARIES IN CLOSING ESTATES, Stephanie E. Donaho 1997 X

L. **Procedure:**

1. BLOOD WILL OUT: THE USE OF DNA EVIDENCE IN TEXAS ESTATE PROCEEDINGS , Hon. Steve King 2006 15

2. STATUTE OF LIMITATIONS IN PROBATE AND TRUST LITIGATION, Helen Wills 1999 U
3. THE MULTIFACETED ESTATE ADMINISTRATION, William Miller 1998 EE
4. WHAT PROBATE JUDGES WANT TO TELL US BUT NOT IN OPEN COURT, Guy Herman, Nikki DeShazo, Sandee Marion, Steve King & Russell Austin 1998 I

IX. **MENTAL HEALTH** MENTAL HEALTH COMMITMENTS–OVERVIEW OF THE PROCESS AND HOW YOU DO IT, Hon. Polly Jackson Spencer 2008 18

X. **GUARDIANSHIP**

A. REALISTIC SOLUTIONS TO COMPLEX GUARDIANSHIPS, Catherine Hendren Goodman and R. Dyann McCully 2010 16
B. COMPENSATION, Hon. Georgia Lee Akers. 2009 15
C. COMMON MISTAKES OF FIDUCIARIES IN ADMINISTRATION OF GUARDIANSHIPS AND ESTATES, R. Dyann McCully & Honorable Polly Jackson Spencer 2007 30
D. GUARDIANSHIP HOT TOPICS, Linda C. Goehrs 2007 4
E. GUARDIANSHIP: A POTPOURRI OF MOTIONS TO SOOTHE THE ANXIOUS GUARDIAN, Heather E. Ridenour and Judge Patrick W. Ferchill 2007 5
F. IS YOUR CLIENT REALLY NCM?, Lisa Jamieson 2006 8
G. GUARDIANSHIP MODIFICATIONS & RESTORATIONS, Linda Goehrs. 2005 28
H. GUARDIANSHIP VS. CONSERVATORSHIPS VS NEXT FRIENDS– WHAT, WHEN, HOW?, Bethann Eccles 2005 26
I. HOT TOPICS FOR THE INCAPACITATED, Sarah Patel Pacheco 2004 24
J. GUARDIANSHIP - THE NEW RULES, Lisa H. Jamieson 2004 5
K. DEATH AND INCAPACITY, Michael J. Cenatiempo 2003 28
L. WHAT'S UP DOC: AN INTERVIEW WITH THE DOCTOR ABOUT LEVELS OF INCAPACITY, Mark A. Burns, Sharon B. Gardner. 2003 7
M. KEYNOTE ADDRESS: THE HUMAN SIDE OF ALZHEIMERS, Dr. Valarie Brideman Davis 2003 6
N. THING'S I'VE LEARNED IN THE "GUARDIANSHIP" TRENCHES, Ms. Sarah Patel Pacheco 2002 34
O. AD LITEM REPRESENTATION INCLUDING CONTESTED MATTERS, Gus G. Tamborello 2002 33
P. INCAPACITY- A PSYCHIATRIST'S PERSPECTIVE, Dr. J. Douglas Crowder, M.D. 2002 32
Q. ALTERNATIVE TO GUARDIANSHIP, Kathleen Ford Bay. 2002 31
R. ADMINISTRATION OF GUARDIANSHIP, Lisa H. Jamieson 2002 30
S. GUARDIANSHIP CASE LAW UPDATE, Sharon B. Garder 2002 29
T. SHOW ME THE MONEY: FIDUCIARY COMPENSATION–HOW TO GET THE PR PAID, HOW MUCH DO THEY GET AND HOW DO I GET PAID, Georgia Akers 2001 32
U. MENTAL HEALTH COMMITMENTS AND PROBLEMS RELATING TO GUARDIANSHIP PROCEEDINGS, James Woo 2001 30
V. THE ROLE OF THE AD LITEM AND CONTESTED ISSUES, Sarah Pacheco. 2001 29
W. ADMINISTERING GUARDIANSHIPS FROM BEGINNING TO END, Jody Helman 2001 28
X. PROVING AND DISPROVING INCAPACITY, David Bakutis 2001 27
Y. INTRODUCTION TO SETTING UP THE GUARDIANSHIP, Sharon Gardner 2001 26
Z. TEN UNANSWERED QUESTIONS IN PROBATE AND GUARDIANSHIP, W. Cameron McCullough, Jr. 2001 6
AA. CREDITORS CLAIMS IN INDEPENDENT, DEPENDENT AND GUARDIANSHIP ESTATES, Mark Schreiber 2001 5
BB. LESS RESTRICTIVE ALTERNATIVES TO GUARDIANSHIP, Holly J. Gilman 2000 12
CC. UNDERSTANDING PSYCHIATRIC DIAGNOSES, Edward Luke M.D. 2000 13
DD. SURVIVAL KIT FOR THE AD LITEM, Honorable Steve M. King 2000 14
EE. CONTESTED GUARDIANSHIP, Sarah Patel Pacheco 2000 15
FF. THE INITIATION AND ADMINISTRATION OF A GUARDIANSHIP-THE BASICS, Linda C. Goehrs 2000 11
GG. ESTATE PLANNING FOR THE INCAPACITATED SPOUSE, Charles E. King. . . . . 1999 D
HH. SPECIAL TRUSTS: §867, §142 AND §1396 (SUPPLEMENTAL NEEDS), Deborah Green 1998 C
II. GUARDIANSHIP LAW UPDATE, Linda C. Goehrs 1998 E
JJ. CONTESTED GUARDIANSHIPS, Sarah Patel Pacheco 1998 F
KK. THE ROLE OF THE AD LITEM, Judge Steve King 1998 J

LL. GUARDIANSHIP ADMINISTRATION, Stephen Jody Helman 1998 O
MM. MEDICAL ISSUES IN GUARDIANSHIP LAW, David Bakutis. . . . . 1998 P
NN. CLAIMS PROCEDURES IN PROBATE AND GUARDIANSHIP, C. Boone Schwartzel 1996 D
OO. ADVANCED GUARDIANSHIP ISSUES, Linda Goehrs 1996 R
PP. DETERMINATION OF INCAPACITY, Ralph Lilly, M.D. 1996 V
QQ. YOU TAKE THE HIGH ROAD AND I'LL TAKE THE LOW ROAD: ATTORNEYS AND GUARDIAN AD LITEM IN GUARDIANSHIP PROCEEDINGS, Nikki DeShazo and Edward Smith III 1996 W
RR. GUARDIANSHIP UPDATE, Linda C. Goehrs & Sharon Brand Gardner. 1995 G
SS. GUARDIANSHIP-A STEP-BY-STEP APPROACH Sharon Brank Gardner & Linda C. Goehrs 1994 E/F
TT. SPECIAL PROBLEMS IN GUARDIANSHIP: A TRUNCATED TRILOGY OF TRYING TRIP-UPS, Honorable Polly J. Spencer 1993 EE
UU. GUARDIAN ADMINISTRATION/LITIGATION CASE UPDATE, Sharon B Gardner & Helen Wils 1991 E
VV. AD LITEMS: APPOINTMENTS, DUTIES, AND PROBLEMS: HANDLING UNCONTESTED MATTERS, Caroline W. Jackson 1990 H
WW. AD LITEMS: APPOINTMENTS, DUTIES, AND PROBLEMS: HANDLING CONTESTED MATTERS, Sharon B. Gardner. . . . . 1990 I
XX. MANAGEMENT OF FIDUCIARY ASSETS, Dennis I. Belcher 1990 X
YY. SPECIAL GUARDIANSHIP PROBLEMS--LIMITED GUARDIANSHIPS, TEMPORARY GUARDIANSHIPS, AND SELECTED ADMINISTRATION QUESTIONS, James J. Aycock 1989 Q

XI. **AD LITEMS**

A. VIRTUAL REPRESENTATION ROLE OF AD LITEM IN NON-GUARDIANSHIP CASES, John Kye Round 2002 42
B. AD LITEM REPRESENTATION INCLUDING CONTESTED MATTERS, Gus Tamborello 2002 33
C. THE ROLE OF THE AD LITEM AND CONTESTED ISSUES, Sarah Pacheco 2001 29
D. THE ROLE OF THE AD LITEM, Judge Steve King 1998 J
E. YOU TAKE THE HIGH ROAD AND I'LL TAKE THE LOW ROAD: ATTORNEY AD LITEMS AND GUARDIAN AD LITEMS IN GUARDIANSHIP PROCEEDSINGS, Judge Nikki Towry DeShazo and Edward W. Smith. . . . . 1996 W
F. AD LITEMS, Sharon Brand Gardner 1992 R
G. AD LITEMS: APPOINTMENTS, DUTIES, AND PROBLEMS: HANDLING UNCONTESTED MATTERS, Caroline W. Jackson 1990 H
H. AD LITEMS: APPOINTMENTS, DUTIES, AND PROBLEMS: HANDLING CONTESTED MATTERS, Sharon B. Gardner 1990 I
I. THE ATTORNEY AD LITEM AS AN ADVOCATE, Honorable Nikki DeShazo & Edward V. Smith III 1986 C

XII. **LITIGATION**

A. **Will Contests**

1. UNDUE INFLUENCE AND LACK OF CAPACITY: HOW MUCH EVIDENCE IS ENOUGH?, P. Keith Staubus 2010 22
2. DEMENTIA AND UNDUE INFLUENCE, Sharon B. Gardner & Mark A. Burns 2009 30
3. POISON PILL PROVISIONS, M. Keith Branyon 2008 10
4. WILL CONTESTS OVERVIEW, Joyce W. Moore. 2007 24
5. UNDUE INFLUENCE–DEAD ALIVE OR LIVE SUPPORT, Keith Branyon 2006 25
6. LITIGATION TACTICS, Joyce W. Moore, Honorable Mike Wood 2004 17
7. HOW YOUR NOTES CAN GET YOU INTO TROUBLE, Darlene Payne Smith 2004 12
8. TORTIOUS INTERFERENCE, Prof. Diane Klein 2003 21
9. VIRTUAL REPRESENTATION ROLE OF AD LITEM IN NON-GUARDIANSHIP CASES, John Kye Round. 2002 42

10. HOT TOPICS IN PROBATE AND TRUST LITIGATION: UNDUE INFLUENCE CASES AND THE "EQUAL INFERENCE RULE," THE USE AND ABUSE OF MOTIONS FOR SUMMARY JUDGEMENTS; EXCULPATORY CLAUSES THAT MAY REALLY WORK, Joyce W. Moore 2002 6
11. ANATOMY OF A TRIAL, Thomas R. Phillips; Darlene Payne Smith; Mike J. Wood 2002 5
12. OFFENSIVE AND DEFENSIVE ESTATE PLANNING, Stephanie Donaho 2001 38
13. WILL CONTESTS, PROCEDURAL SNAFUS, TRIAL TACTICS, Joyce Moore 2001 7
14. STATUTE OF LIMITATIONS IN PROBATE AND TRUST LITIGATION, Helen Wills 1999 U
15. IN TERROREM OR NO CONTEST CLAUSES, John Hopwood. . . . . 1999 L
16. TRIAL OF A WILL CONTEST, Shannon Ratliff 1998 T
17. PREVENTING WILL CONTESTS, Michael J. Cenatiempo 1994 L
18. PREPARING TO TRY A WILL CONTEST, Joseph S. Horrigan 1994 M
19. WILL CONTESTS, Linda C. Goehrs 1993 P
20. TECHNIQUES IN WAGING THE WILL CONTEST AND PREVENTING THE WILL CONTEST, Michael J. Cenatiempo 1992 T
21. WILL CONTEST: EVIDENCE, PROCEDURE, AND EXPERTS, Joseph S. Horrigan. . . . . 1991 M
22. WILL CONTEST: REMEDIES AND SPECIAL ISSUES, Robert M. Bandy 1991 N
23. LITIGATION PANEL--WILL CONTESTS, HOMESTEAD, TRUST ADMINISTRATION, FIDUCIARY LIABILITY, TORTIOUS INTERFERENCE, Robert M. Bandy & Nikki T. DeShazo, Linda L. Kelly & Terry Scarborough 1989 L
24. THWARTING THE WILL CONTEST, Jeffrey L. Crown 1985 L

B. **Construction**

1. WILL CONSTRUCTION, David C. Bakutis 2009 27
2. TRUST MODIFICATION, Philip Lindquist & Mark K. Sales 2007 13
3. LITIGATION TACTICS, Joyce W. Moore, Honorable Mike Wood 2004 17
4. VIRTUAL REPRESENTATION ROLE OF AD LITEM IN NON-GUARDIANSHIP CASES, John Kye Round 2002 42
5. HOT TOPICS IN PROBATE AND TRUST LITIGATION: UNDUE INFLUENCE CASES AND THE "EQUAL INFERENCE RULE," THE USE AND ABUSE OF MOTIONS FOR SUMMARY JUDGEMENTS; EXCULPATORY CLAUSES THAT MAY REALLY WORK, Joyce W. Moore 2002 6
6. ANATOMY OF A TRIAL, Thomas R. Phillips; Darlene Payne Smith; Mike J. Wood 2002 5
7. STATUTE OF LIMITATIONS IN PROBATE AND TRUST LITIGATION, Helen Wills 1999 U
8. GENERAL PRINCIPLES OF WILL CONSTRUCTION, David C. Bakutis 1998 B
9. REFORMATION AND CONSTRUCTION SUITS, Darlene Payne Smith 1994 P
10. PROBATE AND TRUST LITIGATION: DEVELOPMENTS AND STRATEGIES, Jack W. Lawter, Jr. 1988 L

C. **Fiduciary Litigation**

1. ISSUES RELATED TO REMOTE BENEFICIARIES, Frank N. Ikard, Jr. 2010 7
2. FIDUCIARY TRIAL HANDBOOK, Joyce W. Moore 2009 26
3. TRUSTEES DUTIES TO DISCLOSE INFORMATION TO BENEFICIARIES, Frank N. Ikard, Jr. 2008 12
4. COMMON MISTAKES OF FIDUCIARIES IN ADMINISTRATION OF GUARDIAN-SHIPS AND ESTATES, R. Dyann McCully & Honorable Polly Jackson Spencer 2007 30
5. DEALING WITH THE "RUNAWAY" FIDUCIARY, Mary Burdette, Michael Cenatiempo and Alvin Golden. 2006 32
6. SURCHARGE ACTIONS–THE BAD, THE UGLY AND THE ULGIER, Nancy Hamren & Tammy Manning 2005 18
7. LITIGATION TACTICS, Joyce W. Moore, Honorable Mike Wood 2004 17
8. VIRTUAL REPRESENTATION ROLE OF AD LITEM IN NON-GUARDIANSHIP CASES, John Kye Round 2002 42
9. SHOW CAUSE, CONTEMPT, SURCHARGE, Edward V. Smith 2002 7

10. HOT TOPICS IN PROBATE AND TRUST LITIGATION: UNDUE INFLUENCE CASES AND THE "EQUAL INFERENCE RULE," THE USE AND ABUSE OF MOTIONS FOR SUMMARY JUDGEMENTS; EXCULPATORY CLAUSES THAT MAY REALLY WORK, Joyce W. Moore. 2002 6
11. ANATOMY OF A TRIAL, Thomas R. Phillips; Darlene Payne Smith; Mike J. Wood 2002 5
12. DISCOVERING POTENTIAL CAUSES OF ACTION HELD BY TRUSTS, ESTATES AND GUARDIANSHIPS AND POTENTIAL CAUSES OF ACTION AGAINST ESTATES, TRUSTS AND GUARDIANSHIPS, Robert Ammons & Matthew Prebeg 2001 21
13. FIDUCIARY LITIGATION TRIAL HANDBOOK 2000, Joyce W. Moore 2000 23
14. STATUTE OF LIMITATIONS IN PROBATE AND TRUST LITIGATION, Helen Wills 1999 U
15. RISK MANAGEMENT NOTEBOOK: DEFENDING THE FIDUCIARY, Joyce Moore. . . . 1998 S
16. TOP TEN ISSUES IN FIDUCIARY LITIGATION, Samuel Smith 1997 H
17. WHAT EVERY ESTATE PLANNER NEEDS TO KNOW ABOUT FIDUCIARY LITIGATION, Jack W. Lawter, Jr. 1995 M
18. TRIAL HANDBOOK FOR FIDUCIARY LITIGATION, Joyce W. Moore 1995 O
19. FIDUCIARY LIABILITY, Jack W. Lawter, Jr. 1993 K
20. FIDUCIARY LITIGATION, Tom Alan Cunningham. . . . . 1992 U
21. FIDUCIARY LIABILITY, Stephanie E. Donaho 1991 H
22. LITIGATION PANEL--WILL CONTESTS, HOMESTEAD, TRUST ADMINISTRATION, FIDUCIARY LIABILITY, TORTIOUS INTERFERENCE, Robert M. Bandy & Nikki T. DeShazo, Linda L. Kelly & Terry Scarborough 1989 L
23. FIDUCIARY LIABILITY, Stephanie Elbers Donaho 1988 C
24. REPRESENTING THE INDIVIDUAL EXECUTOR/TRUST, Lawrence J. Pirtle 1988 F
25. RECENT DEVELOPMENTS IN PROBATE LITIGATION AND FIDUCIARY LIABILITY, Edward V. Smith III.. . . . . 1987 P

D. **Other Litigation**

1. SHIFTING LIABILITY, Randall O. Sorrels 2009 24
2. TRUST MODIFICATION, Philip Lindquish & Mark K. Sales 2007 13
3. BELT AND MITIGATION: TRIAGE FOR "OOPS!", Patrick J. Pacheco 2007 20
4. BELT UPDATE - PRACTICAL "BELTS" AND SUSPENDERS PANEL DISCUSSION OF HOW TO PLAN TO DEFEND THE "BUT DADDY WOULD HAVE WANTED TO SAVE ALL TAXES" CLAIM, Stephen R. Akers, Michael Lynn Cook, Coyt Randal Johnston & William T. Miller 2007 6
5. THE UNEXPECTED FAMILY: LITIGATING THE DETERMINATION OF A PURPORTED COMMON LAW SPOUSE, Hon. Ruth Ann Stiles.. . . . . 2006 26
6. GUARDIANSHIP VS. CONSERVATORSHIPS VS NEXT FRIENDS– WHAT, WHEN, HOW?, Bethann Eccles 2005 26
7. MARITAL PROPERTY AGREEMENT LITIGATION IN ESTATES AND GUARDIANSHIP, Warren Cole 2004 10
8. TORTIOUS INTERFERENCE, Prof. Diane Klein 2003 21
9. CHALLENGING RELATIONSHIPS/ ADOPTION BY ESTOPPEL, W. Cameron McCulloch, Jr. 2002 17
10. SHOW CAUSE, CONTEMPT, SURCHARGE, Edward V. Smith.. 2002 7
11. CONTESTED GUARDIANSHIP, Sarah Patel Pacheco 2000 15
12. DYSFUNCTIONAL FAMILY LIMITED PARTNERSHIPS: LITIGATION ISSUES RELATED TO FLP'S, Dianne Whitehorn Lawter and Jack W. Lawter, Jr. 2000 18
13. TERMINATING AND MODIFYING IRREVOCABLE TRUSTS, Glenn Karisch 1999 CC
14. STATUTE OF LIMITATIONS IN PROBATE AND TRUST LITIGATION, Helen Wills 1999 U
15. TAX LITIGATION, Donald Lan. . . . . 1999 M
16. CONTESTED GUARDIANSHIPS, Sarah Patel Pacheco 1998 F
17. PROCEEDINGS INVOLVING CHARITABLE TRUSTS, Jan Soifer 1996 DD
18. CONTESTED GUARDIANSHIP PROCEEDINGS, John R. Norris III 1995 N
19. GUARDIAN ADMINISTRATION/LITIGATION CASE UPDATE, Sharon B. Gardner & Helen Wils 1991 E

20. MARITAL PROPERTY AGREEMENTS: CONSTRUCTION AND DESTRUCTION: STANDING THE TEST UNDER FIRE, Donn C. Fullenweider.. . . . . 1990 C
21. LITIGATION PANEL--WILL CONTESTS, HOMESTEAD, TRUST ADMINISTRATION, FIDUCIARY LIABILITY, TORTIOUS INTERFERENCE, Robert M. Bandy & Nikki T. DeShazo, Linda L. Kelly & Terry Scarborough 1989 L
22. PROBATE AND TRUST LITIGATION: DEVELOPMENTS AND STRATEGIES, Jack W. Lawter, Jr. 1988 L

E. **Jurisdiction**

1. JURISDICTION AND VENUE FOR WILL AND TRUST DISPUTES, M. Keith Branyon 2007 21
2. JURISIDICTION, Steve M. King 2002 37
3. JURISDICTION ISSUES, Judge Russell Austin. . . . . 1999 T
4. JURISDICTION AND STRUCTURE OF PROBATE COURTS, Honorable Don R. Windle 1997 E
5. WHEN WARDS DIVORCE--A QUESTION OF JURISDICTION, Carole Clark 1996 T
6. JURISDICTION, Professor Helen B. Jenkins 1993 Q
7. JURISDICTION OF PROBATE COURT, Honorable Kenneth Pat Gregory 1990 G
8. PROBATE JURISDICTION (INCLUDING JOINT TENANCY BANK ACCOUNTS), Jack M. Kinnebrew.. . . . . 1987 Q
9. JURISDICTION AND LITIGATION IN PROBATE PRACTICE, Frank N. Ikard, Jr. 1985 T

F. **Procedure**

1. LIMITATIONS AND LACHES, Jerry Frank Jones 2010 15
2. ISSUES RELATED TO REMOTE BENEFICIARIES, Frank N. Ikard, Jr. 2010 7
3. TO BE OR NOT TO BE...TO SUE OR NOT TO SUE..., Rhonda H. Brink & Joseph S. Horrigan. 2009 7
4. EXTRAORDINARY REMEDIES IN PROBATE DISPUTES, J. Craig Hopper 2008 25
5. DRAFTING A JUDGMENT THAT WORKS AND COLLECTING ON YOUR JUDGMENT, Stuart R. Schwartz & Darlene Payne Smith 2008 24
6. OPEN AND CLOSE LIKE A SPELLBINDER: PRESENTATION SKILLS THAT CAPTURE, MOVE AND PERSUADE IN THE 21ST CENTURY, Justin M. Campbell, III & Katherine James 2008 22
7. SPECIAL ISSUES: JURY CHARGE, Darlene Payne Smith 2007 22
8. JURY SELECTION/ VOIR DIRE, Rusty Hardin, Jr... . . . . 2007 23
9. PRESERVING ERROR AT TRIAL, Cameron McCulloch 2005 19
10. STANDING ISSUES IN PROBATE LITIGATION, Mary Burdette 2005 17
11. LITIGATION TACTICS, Joyce W. Moore, Honorable Mike Wood 2004 17
12. SHOCK, AWE & THE MOTHER OF ALL MOTION BATTLES- SUMMARY JUDGEMENT, David A. Furlow 2004 16
13. SHOW CAUSE, CONTEMPT, SURCHARGE, Edward V. Smith.. . . . . 2002 7
14. PATTERN JURY CHARGES AND JOINT DEFENSE AGREEMENTS IN PROBATE, TRUST AND GUARDIANSHIP LITIGATION, Darlene Payne Smith 2001 10
15. OBTAINING INFORMATION FROM A TRUSTEE OUTSIDE OF FORMAL DISCOVERY, Frank Ikard 1999 V
16. STATUTE OF LIMITATIONS IN PROBATE AND TRUST LITIGATION, Helen Wills 1999 U
17. NEW DISCOVERY RULES AND THEIR IMPACT ON PROBATE AND TRUST LITIGATION, James Hartnett, Jr. 1999 J
18. DISCOVERY IN PROBATE, TRUST & FIDUCIARY LITIGATION, Jim Hartnett, Jr. . . . . . 1998 R
19. ADVANCED PROBATE LITIGATION ISSUES (PROCEDURES, DISCOVERY, JURISDICTION, VENUE, PRIVILEGE, EVALUATION ISSUES), Cenatiempo. Moore, Calloway & Miller 1996 H
20. TRIAL HANDBOOK FOR FIDUCIARY LITIGATION, Joyce W. Moore 1995 O
21. SHOW CAUSE, SURCHARGE AND CONTEMPT PROCEEDINGS IN THE PROBATE COURT, Jim Guiberteau 1993 R
22. PROCEDURAL AND EVIDENTIARY OVERVIEW FOR THE PROBATE LITIGATOR, Sharon Brand Gardner 1993 O

23. COMMON MISTAKES BEFORE THE PROBATE COURT, Honorable Nikki DeShazo. . . . 1992 S
24. CONFLICTS IN REPRESENTATION, Stephen Jody Helman 1990 U
25. MALPRACTICE AND ETHICS: STANDARDS OF CARE AND CONDUCT IN REPRESENTING CLIENTS SOME MALPRACTICE TRAPS IN THE GENERAL CIVIL PRACTICE (AND WAYS TO AVOID THEM)-NOTE TWO ARTICLES, Kathryn M. McGlothlin 1989 C

G. **Discovery**

1. DISCOVERY ISSUES - INCLUDING COMPUTER-GENERATED DOCUMENTS, David A. Chaumette 2009 22
2. TRUSTEES DUTIES TO DISCLOSE INFORMATION TO BENEFICIARIES, Frank N. Ikard, Jr. 2008 12
3. DISCOVERY TOOL KIT, Ruth Stiles 2005 21
4. HOW YOUR NOTES CAN GET YOU INTO TROUBLE, Darlene Payne Smith 2004 12
5. DISCOVERY TOOLKIT–(INCLUDING FORMS) FOR PROBATE, TRUST AND GUARDIANSHIP LITIGATION, Suzanne Goss and Kenneth Fair 2001 9

H. **Evidence**

1. EVIDENTIARY ISSUES - HOW TO GET YOUR DOCUMENTS ADMITTED AND YOUR EVIDENCE BEFORE THE JURY, Jimmy Walker 2008 23
2. CROSS EXAMINATION OF AN EXPERT WITNESS, David J. Beck 2008 21
3. THE INS AND OUTS OF PRIVILEGE IN TRUST LITIGATION, Joyce Moore. 2006 24
4. THE USE OF EXPERT CHALLENGES IN PROBATE AND FIDUCIARY LITIGATION, Darlene Payne Smith, Hon Harvey Brown, Hon, Dale Wainwright 2006 22
5. BLOOD WILL OUT: THE USE OF DNA EVIDENCE IN TEXAS ESTATE PROCEEDINGS , Hon. Steve King 2006 15
6. DEMONSTRATIVE EVIDENCE, Ray Guy 2005 20
7. PRESERVING ERROR AT TRIAL, Cameron McCulloch 2005 19
8. DAUBERT- THE IMPACT ON ESTATE AND FIDUCIARY LITIGATION, Mary Clariday Burdette, Honorable Steve M. King. 2004 15
9. CREATING EFFECTIVE DEMONSTRATIVE EVIDENCE ON A BEER BUDGET, Craig D. Ball 2002 9
10. *DAUBERT*- EFFECTIVE USE OF EXPERTS, INCLUDING DEMONSTRATION OF DIRECT AND CROSS-EXAMINATION, James J. Hartnett, Jr.; Dr. Bryon LaBurt Howard, M.D.; Molly Steele 2002 8
11. "THE ICING ON THE CAKE"–PREPARING YOUR (CAREFULLY SELECTED) WITNESS FOR DEPOSITION AND TRIAL, Joyce Moore 2001 36
12. THE EXPERT WITNESS IN PROBATE LITIGATION, Honorable Guy S. Herman, James J. Hartnett, Jr., Frank N. Ikard, Jr. and Joyce W. Moore 2000 26
13. EVIDENTIARY ISSUES, Honorable Russell P. Austin. 2000 25
14. OBTAINING INFORMATION FROM A TRUSTEE OUTSIDE OF FORMAL DISCOVERY, Frank Ikard 1999 V
15. SPOLIATION AND DESTRUCTION OF EVIDENCE, Price Ainsworth 1999 R
16. DEMONSTRATION OF EXAMINATION OF THE ESTATE PLANNING ATTORNEY AS A FACT OR EXPERT WITNESS, Edward Smith, Samuel Smith, Honorable Nikki DeShazo & Michael Cenatiempo 1997 G
17. PROCEDURAL AND EVIDENTIARY OVERVIEW FOR THE PROBATE LITIGATOR, Sharon Brand Gardner 1993 O
18. THE ESTATE TRUST ATTORNEY AND EXPERT TESTIMONY: HIRING-REPRESENTING-BEING, Robert H. Kroney 1989 K

I. **Settlement**

1. SEALING THE DEAL: CONSIDERATIONS WHEN NEGOTIATING, DRAFTING AND ENFORCING SETTLEMENT AGREEMENTS, Sara Patel Pacheco 2009 31
2. OFFERS OF SETTLEMENT, Cris D. Feldman 2009 25
3. RELEASES AND RECEIPTS AND JUDICIAL ACCOUNTING, Joyce W. Moore 2008 37
4. JOINT FAMILY PROBATE, Mary C. Burdette & Paula K. Larsen 2008 32
5. RELEASE AND INDEMNIFICATIONS, H. Kate Hopkins 2000 24

6. FAMILY SETTLEMENT AGREEMENTS/NONTAX ISSUES, Sarah Patel Pacheco 1999 S
7. TAX ASPECTS OF FAMILY SETTLEMENT AGREEMENTS, Linda Kelly 1998 Y
8. FAMILY SETTLEMENT AGREEMENTS AND THEIR TAX CONSE-QUENCES, Linda Kelly 1996 Q
9. PREPARING YOURSELF AND YOUR CLIENT FOR MEDIATION, Helen B. Jenkins 1996 G
10. MARITAL PROPERTY AGREEMENTS: CONSTRUCTION AND DESTRUCTION: STANDING THE TEST UNDER FIRE, Donn C. Fullenweider 1990 C

J. **Tax Considerations**

1. REVIEW OF ISSUES WITH UNFUNDED BYPASS TRUSTS, Mickey Davis 2006 34
2. TAX CONSIDERATIONS IN SETTLEMENT & JUDGMENTS, Mickey Davis & Sarah Pacheco 2005 15
3. TERMINATING AND MODIFYING IRREVOCABLE TRUSTS, Glenn Karisch 1999 CC
4. TAX ASPECTS OF WILL CONTEST LITIGATION, S. Jody Helman 1994 N
5. TAX CONSIDERATIONS IN PROBATE AND TRUST LITIGATION, Karen S. Gerstner 1991 S

K. **Damages**

1. SHIFTING LIABILITY, Randall O. Sorrels 2009 24
2. DAMAGES IN PROBATE, TRUST AND GUARDIANSHIP CASES, Ray Black 2006 23
3. SURCHARGE ACTIONS–THE BAD, THE UGLY AND ULGIER, Nancy Hamren & Tammy Manning 2005 18
4. SUSTAINING AND CHALLENGING ECONOMIC DAMAGES AND VALUATIONS, Robert A. Hancock 2004 14
5. (INCLUDING ATTORNEYS' FEES), Darlene Payne Smith 1996 L

L. **Appeals**

1. FINALITY OF PROBATE ORDERS FOR APPEAL, Hon. Steve M. King 2009 23
2. APPELLATE TIPS: PRESERVING ERROR AT TRIAL, W. Cameron McCulloch, Jr. 2007 26
3. FINALITY OF PROBATE ORDERS FOR APPEAL, Honorable Steve M. King 2007 25
4. PRESERVING ERROR IN PROBATE, TRUST AND GUARDIANSHIP LITIGATION, Max Hicks 2001 8
5. PRESERVING ERROR AT TRIAL, Cameron McCulloch 2005 19

XIII. **WILLS**

A. PRIVACY PRESERVATION PLANNING IN A DIGITAL WORLD, Bradley Garrett Korell 2010 29
B. PLANNING FOR LIFE AFTER DEATH: THE ABILITY TO CONTROL THE DISPOSITION OF ONE'S REMAINS AND POSTHUMOUS USE OF ONE'S GENENTIC MATERIAL, Joshua S. Rubenstein 2010 27
C. WHAT HAVE SIX YEARS OF THE UPIA'S DONE, IF ANYTHING? SHOULD WE "DRAFT AROUND," "MODIFY," OR JUST PUNT?, Michael J. Cenatiempo. 2010 4
D. DRAFTING TO AVOID LITIGATION, Philip M. Lindquist 2009 13
E. PLANNING FOR UNMARRIED COUPLES, Kathryn G. Henkel 2008 31
F. POISON PILL PROVISIONS, M. Keith Branyon 2008 10
G. WILL CONTESTS OVERVIEW, Joyce W. Moore 2007 24
H. TAX ALLOCATIONS CLAUSE, Stephanie Donaho. 2006 27
I. WILL VAULTS- PROFITS CENTER OR MALPRACTICE TRAP, James E. Brill 2003 33
J. TORTIOUS INTERFERENCE, Prof. Diane Klein 2003 21
K. OFFENSIVE AND DEFENSIVE ESTATE PLANNING, Stephanie Donaho 2001 38
L. DRAFTING WILLS AND TRUSTS FOR THE THIRD MILLENNIUM, Mickey Davis 2001 31
M. IN TERROREM OR NO CONTEST CLAUSES, John Hopwood. . . . . 1999 L
N. ANATOMY OF A WILL, Bernard E. Jones 1996 EE

O. EXCULPATORY CLAUSES AND THEIR EFFECTIVENESS TO PROTECT DRAFTERS AND FIDUCIARIES, Frank N. Ikard 1994 Q
P. THE CHANGING WORLD OF WILL CONSTRUCTION: THE LEGISLATURE'S INFLUENCE, Professor Thomas M. Featherston, Jr. 1994 J
Q. REFORMATION AND CONSTRUCTION SUITS, Darlene Payne Smith 1994 P
R. WILL CONTESTS, Linda C. Goehrs. . . . . 1993 P
S. INTESTACY/WILLS/TRUSTS CASE UPDATE, William P. Cantwell 1991 F
T. REVOCABLE TRUST PLANNING V. TRADITIONAL TESTAMENTARY TRUST PLANNING, Professor Thomas M. Featherston, Jr. 1991 J
U. FIDUCIARY SELECTION, R. Hal Moorman & Donald Malouf 1991 L
V. WILL CONTEST: EVIDENCE, PROCEDURE, AND EXPERTS, Joseph S. Horrigan 1991 M

XIV. **TRUSTS**

A. WHAT HAVE SIX YEARS OF THE UPIA'S DONE, IF ANYTHING? SHOULD WE "DRAFT AROUND," "MODIFY," OR JUST PUNT?, Michael J. Cenatiempo 2010 4
B. DRAFTING TO AVOID LITIGATION, Philip M. Lindquist 2009 13
C. IRREVOCABLE OR NOT? MODIFICATIONS TO TRUSTS, Eric G. Reis 2009 10
D. THE RULE AGAINST PERPETUITIES, Stephanie E. Donaho. 2009 9
E. WHEN THE ONLY ONE YOU TRUST IS YOURSELF - DRAFTING AND PLANNING WITH SELF TRUSTEED IRREVOCABLE NONGRANTOR TRUSTS, Toby M. Eisenberg 2008 2
F. DISCRETIONARY DISTRIBUTIONS PANEL, Alvin J. Golden & Cynthia M. Hatchett, Sarah Patel Pacheco & Marjorie J. Stephens 2008 34
G. COURT CREATED TRUSTS INCLUDING LEGISLATIVE CHANGES, Deborah A. Green 2008 8
H. HISTORICAL TRUST PERFORMANCE UNDER DIFFERENT PAYOUT SCENARIOS, Jordan Sprechman 2007 32
I. TRUST MODIFICATION, Philip Lindquish & Mark K. Sales. 2007 13
J. REVIEW OF ISSUES WITH UNFUNDED BYPASS TRUSTS, Mickey Davis 2006 34
K. TEXAS TRUST CODE CHANGES: DRAFTING AND OTHER PRACTICAL IMPLEMENTATION ISSUES FOR IMPORTANT TRUST CODE CHANGES OVER THE LAST SEVERAL YEARS, William Pargaman 2006 30
L. TRUST PROTECTORS, Marjorie Stephens 2006 28
M. TAX ALLOCATIONS CLAUSE, Stephanie Donaho 2006 27
N. THE CORPORATE TRUSTEE, Cynthia Hatchett. 2005 23
O. RISK MANAGEMENT FOR TRUSTEES, Erwin Davenport 2005 22
P. UPIA TWINS, Deobrah A. Cox 2004 6
Q. SELECTION OF TRUSTEES, Stephen R. Akers 2003 15
R. BENEFICIARY PERSPECTIVE, William T. Miller 2003 14
S. TRUSTEE PERSPECTIVE, Leslie Kiefer Amann. 2003 13
T. THIRD PARTY PERSPECTIVE, Eric J. Taube 2003 12
U. UPIA TWINS, Alvin J. Golden, Sam Hildebrand & Glenn Karisch 2003 8
V. DISCRETIONARY DISTRIBUTION, Frank. N. Ikard 2002 40
W. TRUSTS IN OTHER JURISDICTION AND USING THEIR PROVISIONS CREATIVELY FOR YOUR CLIENTS, Jonathan Blattmachr.. . . . . 2002 21
X. COURT CREATED TRUSTS BEYOND THE BASICS–PROBLEMS FOR DRAFTERS AND ADMINISTRATORS WHO HAVE NO CRYSTAL BALL, Charmayne Moody 2001 39
Y. HANDBOOK FOR THE FIDUCIARY–ADVISING AND COUNSELING EXECUTORS AND TRUSTEES, Kate Hopkins 2001 34
Z. TOTAL RETURN TRUSTS, Alvin Golden 2001 25
AA. NEW SPECIAL NEEDS TRUST OPTIONS FROM THE ARC OF TEXAS MASTER POOLED TRUST, Clyde Farrell 2001 4
BB. OVERVIEW OF TRUST ADMINISTRATION, Erwin Davenport. 2000 27
CC. CURRENT ISSUES: AUDIT AND LITIGATION PERTAINING TO THE FORMATION OF FAMILY OWNED AND CONTROLLED PARTNERSHIPS AND LIMITED LIABILITY COMPANIES, Larry W. Gibbs 2000 6
DD. OBTAINING INFORMATION FROM A TRUSTEE OUTSIDE OF FORMAL DISCOVERY, Frank Ikard 1999 V
EE. MARITAL PROPERTY: CHARACTERIZATION OF INTERESTS IN TRUSTS, INCLUDING DISTRIBUTED AND UNDISTRIBUTED INCOME Thomas Featherston 1999 G

FF. ADMINISTERING THE DISTRIBUTION REQUIREMENT FOR THE TRUST, Randall Lamb 1998 DD
GG. SPECIAL TRUSTS: §867, §142 AND §1396 (SUPPLEMENTAL NEEDS), Deborah Green. . . . . 1998 C
HH. OFFSHORE TRUSTS, Duncan Osborne 1997 W
II. SELECTED MARITAL ISSUES IN THE ESTATE PRACTICE Thomas M. Featherston, Jr. 1996 J
JJ. COURT CREATED TRUSTS AND RELATED TOPICS, Robert Kroney 1996 U
KK. RISK MANAGEMENT FOR THE TRUSTEE IN MAKING DISCRETIONARY DECISIONS (HSME POWERS, "BEST INTEREST"POWERS, INVESTMENT ALLOCATIONS), Michael J. Cenatiempo 1995 W
LL. REFORMATION AND CONSTRUCTION SUITS, Darlene Payne Smith. 1994 P
MM. EXCULPATORY CLAUSES AND THEIR EFFECTIVENESS TO PROTECT DRAFTERS AND FIDUCIARIES, Frank N. Ikard 1994 Q
NN. TRUST ADMINISTRATION: A HANDBOOK FOR THE TRUSTEE, H. Kate Hopkins 1993 F
OO. HOW TO PAY FOR CHILDREN'S AND GRANDCHILDREN'S EDUCATION, Kate H. Hopkins 1992 Z
PP. INTESTACY/WILLS/TRUSTS CASE UPDATE, Professor Gerry W. Beyer 1991 F
QQ. GUARDIAN ADMINISTRATION/LITIGATION UPDATE, Sharon Gardner & Helen Wils.. . . . . 1991 E
RR. FIDUCIARY SELECTION, R. Hal Moorman & Donald Malouf 1991 L
SS. MANAGEMENT OF FIDUCIARY ASSETS, Dennis I. Belcher 1990 X
TT."AMENDING" IRREVOCABLE TRUSTS--PLANNING FOR CHANGES AND TECHNIQUES TO CURE IMPERFECT PROVISIONS, Robert S. Newkirk & Kevin D. Kuenzli 1988 D
UU. REPRESENTING THE INDIVIDUAL EXECUTOR/TRUSTEE, Lawrence J. Pirtle 1988 F
VV. ALLOCATION OF INCOME AND EXPENSES DURING ADMINISTRATION (FIDUCIARY ACCOUNTING VS. INCOME TAX ACCOUNTING), Gary W. Jenson.. . . . . 1988 P
WW. TRUST ADMINISTRATION UNDER THE TEXAS TRUST CODE, Steve R. Akers 1987 G

XV. **INTERVIVOS ("LIVING" AND "LOVING") TRUSTS**

A. THE MULTIFACETED ESTATE ADMINISTRATION (Including Intervivos Trusts), William Miller.. . . . . 1998 EE
B. REPRESENTING THE BENEFICIARY, Professor Helen B. Jenkins 1995 V
C. REVOCABLE TRUST: NUTS AND BOLTS, Bernard E. Jones 1993 FF
D. FUNDING, COMMUNITY PROPERTY, CREDITOR AND OTHER CONCERNS IN THE USE OF REVOCABLE TRUSTS AND SURVIVORSHIP AGREEMENTS, Professor Thomas M. Featherston, Jr. 1992 P
E. REVOCABLE TRUST PLANNING V. TRADITIONAL TESTAMENTARY TRUST PLANNING, Professor Thomas M. Featherston, Jr. 1991 J
F. INTERVIVOS TRUST: ARE THEY REALLY ALIVE AND WELL?, Ronald R. Cresswell. . . . 1990 Q

XVI. **MOBILE (MIGRATING) CLIENTS & TRUSTS**

A. MIGRATING CLIENTS AND ASSETS - INHERITANCE TAX, Michael L. Graham 2008 17
B. COMMON LAW TO COMMUNITY PROPERTY–ESTATE PLANNING FOR THE MIGRATING CLIENT, Sandy Bisgnano, Jr. 2006 3
C. TRANSITORY PLANNING ISSUES, MIGRANT CLIENT AND FIDUCIARIES CROSSING BORDERS AND CONFLICTS BARRIERS. 2001 35

XVII. **FIDUCIARIES**

A. COMPENSATION, Hon. Georgia Lee Akers 2009 15
B. RELEASES AND RECEIPTS AND JUDICIAL ACCOUNTING, Joyce W. Moore 2008 37
C. TRUSTEES DUTIES TO DISCLOSE INFORMATION TO BENEFICIARIES, Frank N. Ikard, Jr. 2008 12
D. REAL PROPERTY MANAGEMENT ISSUES FOR THE FIDUCIARY, Daniel W. Woods 2008 11
E. DEALING WITH THE "RUNAWAY" FIDUCIARY, Mary Burdette, Michael Cenatiempo and Alvin Golden 2006 32

F. FIDUCIARY COMPENSATION, Georgia Lee Akers 2003 24
G. TRUSTEE PERSPECTIVE, Leslie Kiefer Amann 2003 13
H. DISCRETIONARY DISTRIBUTION, Frank. N. Ikard 2002 40
I. TRANSITORY PLANNING ISSUES, MIGRANT CLIENT AND FIDUCIARIES CROSSING BORDERS AND CONFLICTS BARRIERS. 2001 35
J. HANDBOOK FOR THE FIDUCIARY–ADVISING AND COUNSELING EXECUTORS AND TRUSTEES, Kate Hopkins 2001 34
K. SHOW ME THE MONEY: FIDUCIARY COMPENSATION–HOW TO GET THE PR PAID, HOW MUCH DO THEY GET AND HOW DO I GET PAID, Georgia Akers 2001 32
L. TOTAL RETURN TRUSTS, Alvin Golden 2001 25
M. DISCOVERING POTENTIAL CAUSES OF ACTION HELD BY TRUSTS, ESTATES AND GUARDIANSHIPS AND POTENTIAL CAUSES OF ACTION AGAINST ESTATES, TRUSTS AND GUARDIANSHIPS, Robert Ammons & Matthew Prebeg 2001 21
N. THE MULTIFACETED ESTATE ADMINISTRATION, William Miller 1998 EE
O. ADMINISTERING THE DISTRIBUTION REQUIREMENT FOR THE TRUST, Randall Lamb . . . . 1998 DD
P. FIDUCIARY COMPENSATION, David P. Stanush 1996 CC
Q. RISK MANAGEMENT FOR THE TRUSTEE IN MAKING DISCRETIONARY DECISIONS (HSME POWERS, "BEST INTEREST" POWERS, INVESTMENT ALLOCATIONS), Michael J. Cenatiempo 1995 W
R. FIDUCIARY LIABILITY, Jack W. Lawter, Jr. 1993 K
S. FIDUCIARY COMPENSATION, Steven J. Tackett 1993 L
T. FIDUCIARY LIABILITY, Stephanie E. Donaho. . . . . 1991 H
U. FIDUCIARIES AND CERCLA, Michael L. Graham & Philip M. Lindquist 1991 I
V. FIDUCIARY SELECTION, R. Hal Moorman & Donald Malouf 1991 L
W. ANTICIPATING AND DEFENDING FIDUCIARY LITIGATION, Burgain G. Hayes & Steven J. Tackett 1990 F
X. CONFLICTS IN REPRESENTATION, Stephen Jody Helman 1990 U
Y. MANAGEMENT OF FIDUCIARY ASSETS, Dennis I. Belcher. . . . . 1990 X
Z. THE PERSONAL REPRESENTATIVE VS. THE SECURED LENDER, C. Boone Schwartzel & Steven R. Biegel 1989 U
AA. FIDUCIARY LIABILITY, Stephanie Elbers Donaho
BB. REPRESENTING THE INDIVIDUAL EXECUTOR/TRUSTEE, Lawrence J. Pirtle 1988 F
CC. SELECTION OF FIDUCIARIES, Rodney C. Koenig 1987 M
DD. RECENT DEVELOPMENTS IN PROBATE LITIGATION AND FIDUCIARY LIABILITY, Edward V. Smith III. . . . . 1987 P
EE. STORMY WEATHER AHEAD FOR CORPORATE FIDUCIARIES: CHARTING A COURSE TO AVOID FIDUCIARY LIABILITY, Professor Stanley M. Johanson 1986 A

XVIII. **THE BENEFICIARY**

A. ENFORCING BENEFICIARY RIGHTS, Mary C. Burdette. 2010 8
B. RELEASES AND RECEIPTS AND JUDICIAL ACCOUNTING, Joyce W. Moore 2008 37
C. DISCRETIONARY DISTRIBUTIONS PANEL, Alvin J. Golden & Cynthia M. Hatchett, Sarah Patel Pacheco & Marjorie J. Stephens 2008 34
D. THE PERFECT ESTATE PLAN - BUT DID YOU PLAN FOR THE DISABLED BENEFICIARY?, Patricia F. Sitchler 2008 9
E. TRUSTS AND PLANNING ISSUES FOR THE FAMILY PET OR OTHER VALUABLE ANIMAL, Gerry W. Beyer 2005 3
F. BENEFICIARY PERSPECTIVES, William T. Miller. 2003 14
G. OPTIONAL VIDEO “WHO’S YOUR DADDY,” Ellen A. Yarrell 2002 20
H. CHALLENGING RELATIONSHIPS/ ADOPTION BY ESTOPPEL, W. Cameron McCulloch, Jr. 2002 17
I. TAX PLANNING FORTHE NON-TRADITIONAL FAMILIES, Holly Gilman 2001 24
J. WHO’S YOUR DADDY? WHO’S YOUR MAMA? Ellen Yarrell 2001 20
K. THE MULTIFACETED ESTATE ADMINISTRATION, William Miller. . . . . 1998 EE
L. ADMINISTERING THE DISTRIBUTION REQUIREMENT FOR THE TRUST, Randall Lamb 1998 DD
M. THE SLAYER’S RULE REVISITED, M. Keith Branyon 1996 Z

N. REPRESENTING THE BENEFICIARY, Michael J. Cenatiempo 1993 G
O. REPRESENTING THE ESTATE BENEFICIARY, Michael J. Centiempo 1985 O

XIX. **INSURANCE**

A. THE AFTERMATH OF CATASTROPHIC MEDICAL EVENTS– LIFE CARE PLANNING, Renee Lovelace 2005 29
B. SPLIT-DOLLAR LIFE INSURANCE, Phil Linquist 2003 20
C. WHAT ESTATE PLANNERS NEED TO KNOW ABOUT LONG TERM CARE, Earl D. Davidson CFP 2002 41
D. WHAT DO WE DO ABOUT SPLIT DOLLAR AND ABOUT ANNUITIES, Philip Lindquist 2001 22
E. LIFE INSURANCE- WHAT YOU DO NOT KNOW COULD HURT YOUR CLIENT, Frank J. Rief III. 2000 16
F. IRREVOCABLE LIFE INSURANCE TRUSTS, Santo Bisignano, Jr. 1997 C
G. INSURANCE: THE ILLUSIVE ASSET, Robert H. Kroney 1990 T
H. CURRENT DEVELOPMENTS IN INSURANCE, Don E. Fizer 1989 M
I. CURRENT DEVELOPMENTS IN LIFE INSURANCE PLANNING AND PRODUCTS, Donald O. Jansen 1986 D

XX. **BUSINESS ENTITIES AND BUSINESS TRANSACTIONS**

A. NAVIGATING THE MINES AND POTHOLES IN UNWINDING A FAMILY LIMITED PARTNERSHIP, Gary V. Post 2010 21
B. S CORP PLANNING UPDATE, Martin Seth Sosolik and Robert Harper Kroney. 2010 11
C. BUSINESS SUCCESSION PLANNING - 2ND GENERATION, Scott H. Carter 2009 32
D. FLP PLANNING AND MARITAL DEDUCTION, Stephen R. Akers 2009 18
E. ASSET PROTECTION USING TEXAS OR OUT OF STATE ENTITIES, Mark E. Merric 2008 15
F. WHAT EVERY ESTATE PLANNER SHOULD KNOW ABOUT SECURITIES LAW, Patrick J. Pacheco 2008 27
G. REPRESENTING THE PATRIARCH IN FAMILY BUSINESS SUCCESSION, Michael Allen. 2006 12
H. BUSINESS ORGANIZATIONS CODE–EFFECT ON ESTATE PLANNING AND ESTATE PLANNERS, Patrick Pacheco 2006 9
I. SELLING THE FAMILY BUSINESS, James M. Mincey 2003 35
J. ISSUES FOR RETIRING BUSINESS OWNERS, Abigail G.. Kampmann 2003 34
K. BUY SELL AGREEMENTS- UNWINDING NON-FAMILY RELATED BUSINESSES, James M. Mincey, Jr. 2002 22
L. INTERDISCIPLINARY ISSUES INVOLVING LIMITED PARTNERSHIPS AND LIMITED LIABILITY COMPANIES:

ETHIC CONSIDERATIONS, John Bergner 2001 19
CREDITOR RIGHTS AND BANKRUPTCY, John Tate.. . . . . 2001 19
STATE LAW ON PARTNERSHIPS AND LLC, Frank Ruttenberg 2001 19
INCOME, EMPLOYMENT & FRANCHISE T AXES, Barbara Spudis De Marigny 2001 19

M. INTERDISCIPLINARY ISSUES IN PROBATE AND FAMILY LAW– WHEN GOOD PLANNING GOES BAD, Stewart Gagnon, Barbara Anderson, Thomas Featherston and Harry Tindall 2001 17
N. CURRENT DEVELOPMENTS IN FLOW THROUGH ENTITIES, Jay Houren 1999 O
O. CHOICE OF ENTITY FOR SMALL BUSINESSES, Charles “Boxy” Hornberger.. . . . . 1998 AA
P. THE BUSINESS ORGANIZATION TOOLBOX--SELECTING THE APPROPRIATE ENTITY FOR ESTATE PLANNING, Charles “Boxy” Hornberger 1996 M
Q. AN ESTATE PLANNER'S LOOK AT THE LIMITED LIABILITY COMPANY IS IT A VIABLE ALTERNATIVE TO CORPORATIONS, LIMITED PARTNERSHIPS AND TRUSTS? Kent H. McMahan 1994 T
R. FAMILY PARTNERSHIP ALTERNATIVES IN ESTATE PLANNING/VALUATION CONSIDERATIONS, Charles L. Elliott, CFA, ASA, & S. Stacy Eastland 1994 BB

S. PRACTICAL CONSIDERATIONS IN FAMILY LIMITED PARTNERSHIPS, James M. Mincey, Jr. and Michael D. Allen 1993 D
T. BUY-SELL AGREEMENTS, James M. Mincey, Jr.. . . . . 1992 C
U. TAX RESTRAINTS IN BUSINESS PLANNING, Steve R. Akers 1990 AA
V. THE BUY-SELL AGREEMENT FOR THE 90's, Michael D. Weinberg & Lawrence Brody 1990 BB
W. STRUCTURING THE BUSINESS ENTERPRISE, Michael L. Cook & Carolyn M. Beckett 1990 CC
X. BUY/SELL AGREEMENTS, James M. Mincey, Jr. 1989 J
Y. CHOICE OF ENTITIES-BUSINESS PROFESSIONAL, AND FAMILY CORPORATIONS, AND PARTNERSHIPS: ESTATE BUSINESS AND TAX PLANNING CONSIDERATIONS, Larry W. Gibbs. . . . . 1989 V
Z. THE DOING AND UNDOING OF BUSINESS VALUATIONS, James O. Roberts 1989 AA
AA. CHARACTERIZATION OF BUSINESS INTERESTS-PROPRIETORSHIPS, CORPORATIONS, AND PARTNERSHIPS, Steve R. Akers 1986 L
BB. CLOSELY HELD BUSINESS PERKS AND BENEFITS, Gary B. Lawson 1985 F
CC. BUY-SELL AGREEMENTS FOR CLOSELY HELD CORPORATIONS--THE "BOTTOM LINE" ESTATE PLANNING INSTRUMENT FOR THE CLOSELY HELD BUSINESS OWNER, Stephen R. Akers 1985 G
DD. USING CORPORATE RECAPITALIZATIONS TO ADVANTAGE, John A. Wallace.. . . . . 1985 H

XXI. **CREDITORS**

A. ASSET PROTECTION USING TEXAS OR OUT OF STATE ENTITIES, Mark E. Merric 2008 15
B. TRUST PROTECTORS, Marjorie Stephens. 2006 28
C. DOMESTIC ASSET PROTECTION, Elizabeth Schurig 2006 14
D. ADAPTING TO THE 2005 AMENDMENTS TO THE BANKRUPTCY CODE-PROTECTING YOUR CLIENTS AND THOSE THEY LOVE FROM LIVING AT THE MEDIAN, Phil Lindquist 2006 4
E. CREDITOR'S ISSUES - INSOLVENCY AND THE ESTATE, Nathan K. Griffin 2004 27
F. A CURRENT LOOK AT TRUST COMMITTEES, TRUST PROTECTORS AND CO-TRUSTEES, Stephen T. Dyer, G. Philip Morehead 2004 23
G. WHAT A SPOUSE CAN DO TO UNILATERALLY PROTECT THAT SPOUSE'S 'ESTATE' FROM THE OTHER SPOUSE AND THE OTHER SPOUSES'S CREDITORS AND HEIRS, Thomas M. Featherston Jr. 2004 9
H. OFFSHORE, Mario A. Mata 2003 26
I. ONSHORE, Santo Bisignano 2003 25
J. DEALING WITH INSOLVENT ESTATE, Michael Keith Branyon 2002 23
K. INTERDISCIPLINARY ISSUES INVOLVING LIMITED PARTNERSHIPS AND LIMITED LIABILITY COMPANIES: CREDITOR RIGHTS & BANKRUPTCY, John Tate 2001 19
L. CREDITORS CLAIMS IN INDEPENDENT, DEPENDENT AND GUARDIANSHIP ESTATES, Mark Schreiber 2001 5
M. WHO TRUMPS WHO? CLAIMS IN PROBATE COURT, Jeannine C. Flynn. . . . . 1999 F
N. WHEN THE DEBTOR IS MARRIED, INCAPACITATED, DECEASED OR THE SETTLOR, TRUSTEE OR BENEFICIARY, Prof. Thomas M. Featherston 1997 J
O. HOW TO HANDLE THE INSOLVENT ESTATE, Joseph Horrigan 1997 K
P. CLAIMS PROCEDURES IN PROBATE AND GUARDIANSHIP, C. Boone Schwartzel 1996 D
Q. HANDLING CLAIMS AGAINST DECEDENT'S ESTATES, Professor Thomas M. Featherston, Jr. 1995 J
R. ASSET PROTECTION FOR ESTATE PLANNERS, Sam Hildebrand. . . . . 1995 H
S. ASSET PROTECTION VS. ASSET COLLECTION, Thomas N. Crowell 1993 E
T. CREDITOR'S CLAIMS WITH A SPECIAL EMPHASIS ON INDEPENDENT ADMINISTRATION, Joseph S. Horrigan 1993 M
U. LIABILITY OF THE SURVIVING SPOUSE, Deborah Cox 1992 H
V. THE ASSET PROTECTION BENEFITS OF TRADITIONAL ESTATE PLANNING, Santo Bisignano, Jr. 1992 Q
W. UNIFORM FRAUDULENT TRANSFER ACT: PRE-AND POST-DEATH, Professor Helen B. Jenkins. . . . . 1991 T
X. SPOUSAL LIABILITY, Deborah Cox 1991 U
Y. CREDITORS' CLAIMS REVISITED, Thomas O. Barton 1990 J
Z. THE IRS AS A CLAIMANT, William D. Elliott 1990 K

AA. MARITAL PROPERTY--CHARACTERIZATION, REIMBURSEMENT, MANAGEMENT, AND LIABILITY ISSUES, Professor Thomas M. Featherston, Jr. 1989 F
BB. PLANNING AFTER THE ASSETS ARE PROTECTED?, Roger D. Adsamit. . . . . 1989 BB
CC. PROTECTING YOUR CLIENT AND YOURSELF IN HARD TIMES, Stephen J. Helman 1988 Q
DD. ESTATE PLANNING AND CREDITORS CLAIMS-SHOULD WE (AND CAN WE) HELP THE FINANCIALLY "DISTRESSED" CLIENT, Santo Bisignano, Jr. 1987 R
EE. PROTECTING ASSETS, Rhonda H. Brink 1986 H

XXII. SPOUSES

A. MARITAL PROPERTY AGREEMENTS, C. Stephen Saunders and Anne S. Wynne 2010 20
B. A HANDBOOK FOR THE LAWYER REPRESENTING THE SURVIVING SPOUSE FOLLOWING THE DECEDENT’S DEATH, Thomas M. Featherston, Jr.. . . . . 2010 6
C. HOT TOPICS: MARITAL PROPERTY ISSUES AFFECTING THE TRUSTS AND ESTATES PRACTICE, Thomas M. Featherston 2008 36
D. PROTECTING THE SURVIVING SPOUSE, Glen Karisch 2006 33
E. THE UNEXPECTED FAMILY: LITIGATING THE DETERMINATION OF A PURPORTED COMMON LAW SPOUSE, Hon. Ruth Ann Stiles 2006 26
F. FEDERAL PREEMPTION OF TEXAS MARITAL PROPERTY LAW, Thomas G. Featherson, Jr. 2006 2
G. WHAT TO DO WHEN YOUR FAVORITE CLIENT DIVORCES, William Korb & Jeffrey Myers. 2005 25
H. TRUST & ESTATE PERSPECTIVES OF TEXAS MARITAL PROPERTY LAW, Thomas Featherston 2005 9
I. MARITAL PROPERTY AGREEMENT LITIGATION IN ESTATES AND GUARDIANSHIP, Warren Cole 2004 10
J. WHAT A SPOUSE CAN DO TO UNILATERALLY PROTECT THAT SPOUSE’S ‘ESTATE’ FROM THE OTHER SPOUSE AND THE OTHER SPOUSES’S CREDITORS AND HEIRS, Thomas M. Featherston Jr. 2004 9
K. COMMUNITY ADMINISTRATION, John L. Hopwood. 2003 29
L. COMMUNITY PROPERTY AND NON-PROBATE DISPOSITION, Prof. Thomas M. Featherston, Jr. 2003 27
M. CONFLICT ISSUES BETWEEN SPOUSE, Janis Reinken 2003 16
N. INTERDISCIPLINARY ISSUES IN PROBATE AND FAMILY LAW– WHEN GOOD PLANNING GOES BAD, Stewart Gagnon, Barbara Anderson, Thomas Featherston and Harry Tindall 2001 17
O. REIMBURSEMENT: A NEW LOOK FOR THE MILLENNIUM, Professor Thomas M. Featherston, Jr. 2000 4
P. MARITAL PROPERTY: CHARACTERIZATION OF INTERESTS IN TRUSTS, INCLUDING DISTRIBUTED AND UNDISTRIBUTED INCOME, Thomas Featherston. . . . . . 1999 G
Q. ESTATE PLANNING FOR THE INCAPACITATED SPOUSE, Charles E. King 1999 D
R. THE FAMILY LAW PARTNERSHIP-MARITAL PROPERTY AND ETHICAL CONSIDERATIONS, Bernard Jones 1999 C
S. THE GREAT DEBATE: WHEN WORLDS COLLIDE, Stewart Gagnon and Thomas Featherston 1998 Z
T. SELECTED MARITAL ISSUES IN THE ESTATE PRACTICE, Thomas M. Featherston, Jr.. . . . . 1996 J
U. WHEN WARDS DIVORCE--A QUESTION OF JURISDICTION, Carole Clark 1996 T
V. ADMINISTRATION OF COMMUNITY PROPERTY AFTER A SPOUSE’S DEATH, Frank N. Ikard, Jr. 1996 BB
W. SPECIAL RIGHTS OF SURVIVING SPOUSE-HOMESTEAD, EXEMPT PROPERTY, AND THE FAMILY ALLOWANCE, Roger L. Beebe 1994 I
X. THE ESTATE PLANNING/DIVORCE INTERFACE Robert H. Kroney, Thomas P. Goranson, Honorable Paula Larsen 1994 X
Y. MARITAL PROPERTY-CHARACTERIZATION ISSUES AT DIVORCE AND DEATH, Linda L. Kelly and Kenneth D. Fuller 1993 A
Z. TAX TRAPS IN MARITAL AGREEMENTS, Barbara McComas Anderson. . . . . 1993 B
AA. MARITAL PROPERTY AGREEMENTS, Barbara McComas Anderson 1992 X
BB. SPOUSAL LIABILITY, Deborah Cox 1991 U
CC. MARITAL PROPERTY AGREEMENTS: CONSTRUCTION AND DESTRUCTION DRAFTING AND PLANNING CONSIDERATIONS, H. Kate Hopkins. . . . . 1990 B

DD. MARITAL PROPERTY AGREEMENTS: CONSTRUCTION AND DESTRUCTION: STANDING THE TEST UNDER FIRE, Donn C. Fullenweider 1990 C
EE. MANAGEMENT, ADMINISTRATION AND DISPOSITION OF MARITAL PROPERTY, Professor Thomas M. Featherston 1990 D
FF. MARITAL PROPERTY--CHARACTERIZATION, REIMBURSEMENT, MANAGEMENT, AND LIABILITY ISSUES, Professor Thomas M. Featherston, Jr. 1989 F
GG. COMMUNITY PROPERTY TRACING CONCEPTS, Stewart Gagnon, Robert S. Hoffman & Lisa D. Harbour 1989 G
HH. COMMUNITY PROPERTY WITH RIGHT OF SURVIVORSHIP, Kathryn G. Henkel. . . . . 1989 H
II. THE WIDOW'S ELECTION, Brainerd S. Parrish 1989 I
JJ. RECENT COMMUNITY PROPERTY DEVELOPMENTS INCLUDING, RIGHTS OF SURVIVORSHIP AND UNIFORM PRENUPTIAL ACT, Professor Thomas M. Featherston, Jr. 1988 I
KK. REMOVING THE RISK FROM THE RITE-MARITAL PROPERTY PLANNING FOR MODERN MARRIAGES, RECENT DEVELOPMENTS IN COMMUNITY PROPERTY LAW AND RELATED TAX LAWS, Barbara McComas Anderson 1987 I
LL. HOMESTEAD, FAMILY ALLOWANCE, AND RIGHTS AND LIABILITIES OF SURVIVING SPOUSE, Roger L. Beebe 1985 M
MM. COMMUNITY PROPERTY VS. SEPARATE PROPERTY-CHARACTERIZATION, REIMBURSEMENT AND PLANNING AFTER JENSEN, Edwin W. Davis. . . . . 1985 N

XXIII. **POWERS OF ATTORNEY & OTHER DIRECTIVES**

A. POWERS OF ATTORNEY BATTLES, Lisa H. Jamieson 2008 38
B. TWILIGHT PLANNING: USING ADVANCED TECHNIQUES TO PLAN FOR INCAPACITY, Stefnee Ashlock. 2007 31
C. IS YOUR CLIENT REALLY NCM?, Lisa Jamieson 2006 8
D. MEDICAL POWERS, WHAT DO THEY MEAN, WHO CAN ACT, AND WHAT WORKS IN THE REAL WORLD, Patricia F. Sitchler 2005 6
E. DISABLED PERSPECTIVE ON ESTATE AND TRUST PRACTICE, Rhonda H. Brink 2004 25
F. HOT TOPICS FOR THE INCAPACITATED, Sarah Patel Pacheco 2004 24
G. HIPAA LAW AND PRACTICE, George Lee Akers. 2004 2
H. AGENTS, PRINCIPLES, AND DURABLE POWERS OF ATTORNEY- A LOVE HATE RELATIONSHIP, David P. Stanush 2003 32
I. POWER OF ATTORNEY UPDATE, Kathleen Ford Bay 2002 39
J. ELDER LAW BASICS AND UPDATE, Renee Colwill Lovelace 2002 26
K. STATUTORY FORM UPDATE: AN OVERVIEW OF STATE STATUTORY FORMS REVISED BY THE ‘99 TEXAS LEGISLATURE, Bernard E. Jones 2000 2
L. ESTATE PLANNING FOR THE INCAPACITATED SPOUSE, Charles E. King. . . . . 1999 D
M. MYRIAD OF ISSUES INVOLVING MULTI-PARTY BANK ACCOUNTS, POWERS OF ATTORNEY, David Bakutis 1997 L
N. BITTER ENDINGS: DISPUTES AND THE LAW REGARDING DO NOT RESUSCITATE ORDERS AND DISPOSITION OF THE BODY, Anne Miller 1996 AA
O. PLANNING FOR THE PHYSICAL REALITY OF DEATH AND DISPOSITION OF REMAINS, James C. Woo 1994 G
P. ESTATE PLANNING FOR INCAPACITATED INDIVIDUALS, Bernard E. Jones. . . . . 1994 Y
Q. ELDER LAW PLANNING, Charles W. Girard 1992 DD
R. BENEFITS AND PLANNING FOR THE ELDERLY INCLUDING THE DISABLED, Deborah Cox Morgan 1989 W
S. PLANNING FOR THE DISABLED CLIENT: POWERS OF ATTORNEY, REVOCABLE TRUSTS, FEDERAL AND STATE ASSISTANCE PROGRAMS, Linda A. Wilkins 1986 F
T. TEXAS MENTAL HEALTH COMMITMENTS, Honorable Jim Scanlan 1985 Q

XXIV. **ELDER LAW & GOVERNMENTAL ASSISTANCE**

A. WHAT EVERY ESTATE PLANNER SHOULD KNOW ABOUT WATER LAW, John R. Ott 2010 25
B. IT SEEMED LIKE A GOOD IDEA AT THE TIME: HOW SOME TRADITIONAL ESTATE PLANNING TECHNIQUES CAN ADVERSELY AFFECT QUALIFYING FOR GOVERNMENT BENEFITS, Deborah A. Green and Stephen Jody Helman 2010 3

C. NURSING HOME CONTRACTS, Marilyn G. Miller. 2009 4
D. THE PERFECT ESTATE PLAN - BUT DID YOU PLAN FOR THE DISABLED BENEFICIARY?, Patricia F. Sitchler 2008 9
E. COURT CREATED TRUSTS INCLUDING LEGISLATIVE CHANGES, Deborah A. Green 2008 8
F. TOP TEN THINGS ESTATE PLANNERS/GUARDIANS NEED TO KNOW ABOUT MEDICAID, H. Clyde Farrell 2008 7
G. MEDICAID UPDATE, Wesley E. Wright 2007 29
H. HOW MEDICAID PLANNING IMPACTS OTHER ISSUES, Ricky Bob Weaver.. . . . . 2007 27
I. SPECIAL NEEDS TRUST - OPTIONS, TRENDS AND THE INTERFACE WITH TAX AND OTHER GOOD PLANNING, Renee Colwill Lovelace 2007 3
J. MEDICAID CHANGES AND STRATEGIES, Wesley Wright 2006 7
K. THE SECRET MISSION OF OLDER CLIENTS: INSIGHTS & TOOLS FOR ATTORNEYS, David Solie 2006 5
L. KEEPING THE FOCUS ON QUALITY CARE, Clyde Farrell 2005 31
M. MEDICAID ESTATE RECOVERY UPDATE, Wesley Wright. 2005 30
N. THE AFTERMATH OF CATASTROPHIC MEDICAL EVENTS– LIFE CARE PLANNING, Renee Lovelace 2005 29
O. DISABLED PERSPECTIVE ON ESTATE AND TRUST PRACTICE, Rhonda H. Brink 2004 25
P. MEDICAID ESTATE RECOVERY, Wesley Wright. 2004 3
Q. KEYNOTE ADDRESS: THE HUMAN SIDE OF ALZHEIMERS, Dr. Valarie Brideman Davis 2003 6
R. WHAT'S UP DOC? AN INTERVIEW WITH THE DOCTOR ABOUT LEVELS OF INCAPACITY, Mark A. Burns, and Sharon B. Gardner. 2003 7
S. WHAT ESTATE PLANNERS NEED TO KNOW ABOUT LONG TERM CARE, Earl D. Davidson CFP 2002 41
T. ELDER LAW BASICS AND UPDATE, Renee Colwill Lovelace 2002 26
U. REPORT ON MEDICARE AFTER THE HMO RETREAT, WHAT'S NEW IN ADVANCED MEDICAID PLANNING TECHNIQUES AND PROSPECTIVE DILEMMAS IN MEDICAID PLANNING, Wesley Wright 2001 18
V. NEW SPECIAL NEEDS TRUST OPTIONS FROM THE ARC OF TEXAS MASTER POOLED TRUST, Clyde Farrell. 2001 4
W. DISABILITY BENEFITS IN THE ESTATE PLAN: PASSING THE MEANS TEST, Clyde Farrell. 1999 Y
X. ESTATE PLANNING FOR THE INCAPACITATED SPOUSE, Charles E. King. . . . . 1999 D
Y. SPECIAL TRUSTS: §867, §142 AND §1396 (SUPPLEMENTAL NEEDS), Deborah Green 1998 C
Z. ESTATE PLANNING USING NON-MEDICAID DISQUALIFYING SELF-SETTLED AND THIRD-PARTY CREATED TRUSTS, Clifton B. Krause, Jr. 1995 K
AA. SPECIAL NEEDS AND MEDICAID TRUSTS AFTER OKRA, Ronald R. Cresswell 1994 Z
BB. ELDER/DISABLED LAW PLANNING, MEDICAID, ETC., Pi-Yi Mayo 1993 DD
CC. ELDER LAW PLANNING, Charles W. Girard 1992 DD
DD. BENEFITS AND PLANNING FOR THE ELDERLY INCLUDING THE DISABLED, Deborah Cox Morgan 1989 W
EE. PLANNING FOR A DISABLED OR RETARDED PERSON IN LIGHT OF FEDERAL AND STATE ASSISTANCE PROGRAMS, Linda A. Wilkins. . . . . 1988 U
FF. PLANNING FOR THE DISABLED CLIENT: POWERS OF ATTORNEY, REVOCABLE TRUSTS, FEDERAL AND STATE ASSISTANCE PROGRAMS, Linda A. Wilkins 1986 F
GG. TEXAS MENTAL HEALTH COMMITMENTS, Honorable Jim Scanlan 1985 Q

XXV. **THE ENVIRONMENT:**

A. PLANNING FOR OWNERS OF OIL AND GAS INTERESTS, Craig Adams 2006 29
B. WHAT ESTATE PLANNERS NEED TO KNOW ABOUT REAL ESTATE, MINERAL, SUBSURFACE AND TIMBER AND ENVIRONMENTAL ISSUES, John Newton Gambrell V 2002 27
C. ENVIRONMENTAL LIABILITY, Michael L. Graham 1992 D
D. CERCLA: FIDUCIARIES AND CERCLA, Michael L. Graham & Philip M. Lindquis 1991 I

XXVI. **MEDIATION**

A. A "DISABLED" PERSPECTIVE ON ESTATE AND TRUST PRACTICE, Rhonda H. Brink 2004 25
B. THE PROCESS AND ETHICAL CONSIDERATIONS ASSOCIATED WITH MEDIATION, Ross W. Stoddard III 2004 13
C. MEDIATION IN TRUSTS, ESTATES AND GUARDIANSHIPS, Samuel Graham 1998 U
D. PREPARING YOURSELF AND YOUR CLIENT FOR MEDIATION, Helen B. Jenkins 1996 G
E. CONFLICT RESOLUTION TECHNIQUES FOR USE IN ARBITRATION, MEDIATION, AND ATTORNEY-CLIENT RELATIONSHIP, Charles F. Guittard 1993 J

XXVII. **LAWYERS, ETHICS & CLIENTS**

A. HANDLING FUTURE STOCK: IMPERSONAL TECHNOLOGY AND DECREASED TAX CONCERNS COLLIDE - KEEPING AND SERVING THE CLIENTS IN A CHANGING WORLD, Marjorie J. Stephens 2010 31
B. NO SEX, NO LIES, NO ENGAGEMENT AGREEMENTS AND OTHER ISSUES IN LIGHT OF THE NEW/PROPOSED DISCIPLINARY RULES, R. Hal Moorman 2010 30
C. LUNCHEON PRESENTATION: PROFESSIONALISM AND CIVILITY, Edward V. Smith, III 2010 18
D. DEALING WITH DYSFUNCTIONAL CLIENTS: WHEN TO BAIL, WHEN TO STAY, WHEN TO SAY "THERE AIN'T NO WAY," Glenn M. Karisch 2010 2
E. LUNCHEON PRESENTATION: WHOM DO YOU REPRESENT?, Michael B. Newman 2009 6
F. LANDMINES FOR LAWYERS, Linda C. Goehrs & W. Cameron McCulloch, Jr. 2008 35
G. DUTY OF ATTORNEY TO REPORT ABUSE AND EXPLOITATION, Honorable Georgia Lee Akers 2007 28
H. BELT AND MITIGATION: TRIAGE FOR "OOPS!", Patrick J. Pacheco 2007 20
I. PRACTICING FROM THE SHADOWS: DEPRESSION AND THE LEGAL PROFESSION, Martha S. Dickie 2007 8
J. BELT UPDATE - PRACTICAL "BELTS" AND SUSPENDERS PANEL DISCUSSION OF HOW TO PLAN TO DEFEND THE "BUT DADDY WOULD HAVE WANTED TO SAVE ALL TAXES" CLAIM, Stephen R. Akers, Michael Lynn Cook, Coyt Randal Johnston & William T. Miller 2007 6
K. RECORD RETENTION OR WHOSE FILE IS IT ANYWAY? James Brill 2006 13
L. THE PROCESS AND ETHICAL CONSIDERATIONS ASSOCIATED WITH MEDIATION, Ross W. Stoddard III. 2004 13
M. ETHICAL AND MALPRACTIVE ISSUES FOR THE ESTATE PLANNINGAND PROBATE PRACTITIONER, Coyt Randal Johnston 2004 4
N. CONFLICT ISSUES BETWEEN SPOUSE, Janis Reinken 2003 16
O. ON DEATH & DYING: COUNSELING THE TERMINALLY ILL CLIENT AND POST DEATH GRIEF OF THE LOVED ONES LEFT, Georgia Lee Akers 2002 38
P. CONFIDENTIALITY & PRIVILEGE ISSUES ARISING FROM THE INTERNET, CELL PHONES, FAXES, AND E-MAILS, Richel Rivers 2002 25
Q. "IT'S WHAT I LIKE ABOUT YOU" (AND DON'T LIKE), Panel: Judge Steven King, Judge Gladys Burwell, Judge Nikki DeShazo, Judge Polly Spencer and Judge Dennis Watson.. . . 2001 41
R. ETHICS AND MALPRACTICE TRAPS AND ISSUES FOR THE ESTATE PLANNING PRACTITIONER, Mark L. Greenwald, Janis Reinkin and Thomas C. Riney 2000 28
S. DEALING WITH THE DEATH OF A SOLE PRACTITIONER, James E. Brill 2000 8
T. THE FAMILY LAW PARTNERSHIP–MARITAL PROPERTY AND ETHICAL CONSIDERATIONS, Bernard Jones 1999 C
U. ETHICS JEOPARDY, Holly Gilman 1998 G
V. DEALING WITH THE DIFFICULT CLIENT, Darlene Payne Smith. . . . . 1998 N
W. MULTI-PARTY REPRESENTATION, Rust E. Reid 1996 K
X. LAST CHANCE PLANNING FOR YOUNG CLIENTS, Rhonda Brink 1996 S
Y. ETHICS: TREADING IN THE GENE POOL, Rhonda H. Brink 1995 BB
Z. FITTING THE PEACEFUL ESTATE PLANNER AND PROBATE, LAWYER INTO ETHICAL RULES DESIGNED FOR ADVERSARIES: THE MODEL RULES AND THE TEXAS PERSPECTIVE, Bruce Ross & Professor Charles Silver 1994 H
AA. ENGAGEMENT LETTERS FOR ESTATE ADMINISTRATION, Marshall Groce. . . . . 1993 H
BB. LONG TERM REPRESENTATION OF THE FAMILY, Thomas H. Watkins 1993 I

CC. CONFLICT RESOLUTION TECHNIQUES FOR USE IN ARBITRATION, MEDIATION, AND ATTORNEY-CLIENT RELATIONSHIP, Charles F. Guittard 1993 J
DD. ETHICS; REPRESENTATION ISSUES, REPRESENTATION LETTERS, Lawrence J. Pirtle 1992 N
EE. THE LAWYER AS A DEFENDANT: ISSUES OF LEGAL MALPRACTICE, ETHICS AND BREACH OF FIDUCIARY DUTY IN ESTATE PLANNING AND PROBATE ACTION, Joyce W. Moore 1992 O
FF. PRO BONO, Jerry Frank Jones.. . . . . 1992 BB
GG. THE IMPACT OF GRIEF ON LEGAL AND FINANCIAL DECISIONS, George Butler, M.Th., M.S. 1990 L
HH.. ENHANCING LAWYER/CLIENT COMMUNICATION, Ann S. Sliman. . . . . 1990 M
II. ECONOMICS AND ETHICS, Robert M. Bandy 1990 N
JJ. CONFLICTS IN REPRESENTATION, Stephen Jody Helman 1990 U
KK. LAWYERS, FAMILIES AND FEELING SIGNALS, David E. Lange, Ph.D. 1990 Z
LL. MALPRACTICE AND ETHICS: STANDARDS OF CARE AND CONDUCT IN REPRESENTING CLIENTS/SOME MALPRACTICE TRAPS IN THE GENERAL CIVIL PRACTICE (AND WAYS TO AVOID THEM)--NOTE TWO ARTICLES, Kathryn M. McGlothlin 1989 C
MM. MALPRACTICE AND ETHICS IN 1988: THE DILEMMA, Larry W. Gibbs 1988 G
NN. MALPRACTICE AND ETHICS, Professor Ronald C. Link 1987 O
OO. WHAT DEATH DOES TO THOSE WHO DO NOT DIE, Dr. William Spong 1986 J
PP. CAVEAT VENDITOR-SELLER BEWARE, Rhonda H. Brink. . . . . 1985 R

XXVIII. **RUNNING THE OFFICE**

A. **Office** A “DISABLED” PERSPECTIVE ON ESTATE AND TRUST PRACTICE, Rhonda H. Brink 2004 25

B. **Fees & Fee Agreements**

1. BILLING IN A PARETO OPTIMAL WORLD: CREATIVE PRACTICE MANAGEMENT TECHNIQUES TO MATCH EXCELLENT ESTATE PLANNING WITH THE CLIENT’S WILLINGNESS TO PAY FOR SERVICES, Louis S. Harrison 2010 1
2. ABRITRATION - AN ALTERNATIVE DISPUTE RESOLUTION TOOL IN THE ATTORNEY’S PROFESSIONAL RESPONSIBILITY REPETOIRE THAT WORKS FOR YOU AND YOUR CLIENT, John K. Boyce III 2004 26
3. A “DISABLED” PERSPECTIVE ON ESTATE AND TRUST PRACTICE, Rhonda H. Brink. 2004 25
4. ATTORNEY FEE CONTRACTS FOR PLANNING AND LITIGATION, Frank, N. Ikard 2003 11
5. MARKETING, Maria E. Quinn 2002 3
6. FEES CONTRACTS, GETTING PAID, KEEPING CLIENTS HAPPY , AND STAYING ETHICAL, Hal Moorman 2001 11
7. GETTIN’ DOWN TO BIDNESS: A SURVEY ON ECONOMICS, PRACTICE MANAGEMENT AND LIFE QUALITY ISSUES FOR TEXAS ESTATE PLANNING AND PROBATE ATTORNEYS AT THE TURN OF THE CENTURY, David P. Hassler, R. Hal Moorman, Molly Thornberry, Patrick J. Pacheco and Sharon Brand Gardner
8. DAMAGES (INCLUDING ATTORNEYS’ FEES), Darlene Payne Smith 1996 L
9. ENGAGEMENT LETTERS FOR ESTATE ADMINISTRATION, Marshall Groce. . . . . 1993 H
10. ETHICS: REPRESENTATION ISSUES, REPRESENTATION LETTERS, Lawrence J. Pirtle 1992 N
11. FEES, COLLECTING FEES, AND MARKETING, Donald J. Malouf, James M. Mincey, Jr., C. Stephen Saunders & Ronald R. Cresswell 1991 O
12. ECONOMICS AND ETHICS, Robert M. Bandy 1990 N

13. EARLY-BIRD WORKSHOP CONCERNING SETTING AND COLLECTING FEES, USING ENGAGEMENT LETTERS, PARALEGALS, CHECKLISTS AND OTHER TECHNIQUES IN ESTATE PLANNING AND ADMINISTRATION PRACTICE, Charles W. Girard, David P. Hassler, Mary C. Holecek & Tom Normand 1988 H

C. **Forms**: DRAFTING FOR ESTATE FORMS, Rust E. Reid 1985 J

D. **Computers**
1. PRIVACY PRESERVATION PLANNING IN A DIGITAL WORLD, Bradley Garrett Korell 2010 29
2. EARLY BIRD SESSION: OFFICE TECHNOLOGY, Thomas C. Baird & Glenn M. Karisch 2008 14
3. TOP 10 BRILLIANCE & BLUNDERS- A VIEW FROM THE WEBMASTER, Glenn M. Karisch 2002 28
4. CONFIDENTIALITY & PRIVILEGE ISSUES ARISING FROM THE INTERNET, CELL PHONES, FAXES, AND EMAILS, Richel Rivers 2002 25
5. INTERNET RESEARCH, Glenn Karisch 2001 43
6. INTERNET RESOURCES AND WEBSITE INFORMATION FOR ESTATE PLANNERS, Steven Tackett 1999 AA
7. INTERNET RESOURCES FOR THE ESTATE PLANNER, Glenn Karisch. . . . . 1998 AA
8. DOCUMENT ASSEMBLY I, Vincent F. Lackner, Jr. 1992 J
9. DOCUMENT ASSEMBLY FOR THE COMPUTER NEOPHYTE J. David Tracy 1992 K
10. DOCUMENT ASSEMBLY FOR TEXAS WILLS USING THE CAPS SOFTWARE AND COMPUTERS, Professor Henry J. Lischer & Robert B. Payne 1991 V
11. SUPPORT SYSTEMS FOR SURVIVING IN THE 90'S, Noel C. Ice 1990 O
12. TECHNOLOGY WILL REVOLUTIONIZE THE WAY LAWYERS HANDLE ESTATE PLANNING, Robert P. Wilkins. . . . . 1989 S

E. **Winding Up.**
1. RECORD RETENTION OR WHOSE FILE IS IT ANYWAY? James Brill 2006 13
2. DEALING WITH THE DEATH OF A SOLE PRACTITIONER, James E. Brill 2000 8

XXIX. **REAL ESTATE**

A. CONVEYANCING TECHNIQUES TO PRESERVE TITLE INSURANCE IN ESTATE PLANNING AND PROBATE TRANSACTIONS, D’Ana H. Mikeska & Michael A. Wren 2008 19
B. REAL PROPERTY MANAGEMENT ISSUES FOR THE FIDUCIARY, Daniel W. Woods 2008 11
C. PLANNING FOR OWNERS OF OIL AND GAS INTERESTS, Craig Adams 2006 29
D. OIL & GAS LAW- WHAT ESTATE PLANNERS NEED TO KNOW, Jeff Hart 2003 9
E. WHAT ESTATE PLANNERS NEED TO KNOW ABOUT REAL ESTATE, MINERAL, SUBSURFACE AND TIMBER AND ENVIRONMENTAL ISSUES, John Newton Gambrell V 2002 27
F. HOMESTEAD AFTER HOME EQUITY, Steven C. Haley 2000 5
G. ESTATE PLANNING FOR OIL AND GAS PROPERTIES, Paul C. Pearson III. . . . . 1995 Q
H. SECTION 2032A SPECIAL USE VALUE- THE LITTLE MAN UPON THE STAIR (OR, I'VE GOT THOSE RECAPTURE TAXBLUES), Donald H. Kelley 1995 AA
I. SECTION 2032A ELECTION, Alfred G. Holcomb 1993 BB
J. PERFECTING TITLE AND TRANSFERRING REAL PROPERTY OUT OF THE ESTATE, Allen K. Cummings & Robert H. Dawson 1986 B
K. MAKING USE OF THE ESTATE TAX SAVINGS AVAILABLE FROM IRC SECTION 2032 A, Clark S. Willingham 1986 J

XXX. **ATTORNEYS FEES**:

A. BILLING IN A PARETO OPTIMAL WORLD: CREATIVE PRACTICE MANAGEMENT TECHNIQUES TO MATCH EXCELLENT ESTATE PLANNING WITH THE CLIENT'S WILLINGNESS TO PAY FOR SERVICES, Louis S. Harrison 2010 1
B. ATTORNEY FEE CONTRACTS FOR PLANNING AND LITIGATION, Frank N. Ikard 2003 11
C. WHAT ESTATE PLANNERS NEED TO KNOW ABOUT LONG TERM CARE, Earl D. Davidson CFP 2002 41
D. FEES CONTRACTS, GETTING PAID, KEEPING CLIENTS HAPPY , AND STAYING ETHICAL, Hal Moorman 2001 11
E. DAMAGES (INCLUDING ATTORNEYS' FEES), Darlene Payne Smith 1996 L

XXXI. **CHARITIES**:

A. FOUNDER'S SYNDROM: PERSPECTIVES ON PROTECTING THE PUBLIC INTEREST AND CHARITIES, Hon. Polly Jackson Spencer, and Susan Staricka 2010 19
B. CREATIVE APPLICATIONS FOR CHARITABLE ENTITIES, INCLUDING FOR PROFIT LLC'S WITH A NON PROFIT PURPOSE, Michael D. Martin 2010 9
C. COMMUNITY FOUNDATIONS, C. Stephen Saunders & Shannon G. Guthrie. 2009 28
D. CURRENT COMPLIANCE ISSUES FOR YOUR CHARITIES: ARE YOU ALREADY OUT ON A LIMB?, Frank Sommerville, Marilyn G. Phelan and Darren B. Moore 2009 21
E. FIDUCIARY DUTIES AND POTENTIAL LIABILITIES RELATING TO CHARITABLE ENTITIES, Darren B. Moore 2008 33
F. CHARITABLE PLANNING FOR CLIENTS WHO AREN'T WEALTHY: IDEAS AND FORMS YOU CAN TAKE BACK TO YOUR OFFICE AND USE ON MONDAY, Shannon G. Guthrie & Stephen Saunders 2007 11
G. CHARITABLE ISSUES WITH OR WITHOUT ESTATE TAX–PHILANTHROPY IS ALIVE AND WELL, Jeffrey Myers 2001 23
H. FOUNDATIONS: TO BE OR NOT TO BE...PRIVATE, OPERATING, COMMUNITY, AND SUPPORTING ORGANIZATIONS- THE DELICATE BALANCE OF CONSIDERATIONS OF BENEFITS, COSTS, AND CONTROL. Shannon G. Guthrie. 2000 31
I. LEGISLATIVE DEVELOPMENTS IN CHARITABLE PLANNING, Terry Simmons 1999 H
J. PRIVATE FOUNDATIONS VS. COMMUNITY FOUNDATIONS, Michael Bourland 1998 H
K. CARE AND FEEDING PRIVATE FOUNDATIONS, Taryn Milewski 1997 V
L. PROCEEDINGS INVOLVING CHARITABLE TRUSTS, Jan Soifer 1996 DD

XXXII. **DISPOSITION OF REMAINS:**

A. PLANNING FOR LIFE AFTER DEATH: THE ABILITY TO CONTROL THE DISPOSITION OF ONE'S REMAINS AND POSTHUMOUS USE OF ONE'S GENENTIC MATERIAL, Joshua S. Rubenstein 2010 27
B. FAMILY OPTIONS FOR FUNERALS, David C. Bakutis 2007 14
C. DEALING WITH THE BODY - EVERYTHING YOU EVER NEEDED TO ABOUT THE CORPUS, David C. Bakutis 2004 29
D. PLANNING FOR THE PHYSICAL REALITY OF DEATH AND DISPOSITION OF REMAINS, James C. Woo 1994 G

XXXIII. **INTERNATIONAL AND ALIENS**

A. INTERNATIONAL ISSUES IN ESTATE ADMINISTRATION, R. Glenn Davis 2010 26
B. MONEY LAUNDERING/FATF, Duncan E. Osborne 2009 5
C. CURRENT LOOK AT TRUST COMMITTEES, TRUST PROTECTORS AND CO-TRUSTEES, Stephen T. Dyer, G. Philip Morehead 2004 23
D. OFFSHORE, Mario A. Mata 2003 26
E. OFFSHORE TRUSTS, Duncan Osborne 1997 W