

TEXAS GUARDIANSHIP ASSOCIATION



**REMEMBER
THE
ALTERNATIVES**

**SAN ANTONIO
TEXAS**

20 ★ 24

ANNUAL CONFERENCE

September 17-20, 2024

Embassy Suites by Hilton San Antonio Landmark

Tuesday, September 17

- 12:00 – 6:00 pm Conference Registration Set-up
- 1:00 – 5:00 pm Exhibitor Move-in
- 6:00 – 8:00 pm TGA Board of Directors Meeting/Dinner

Wednesday, September 18

- 8:30 – 10:00 am **Guardianship Nuts and Bolts (CEU 1.5/ CLE 1.5 Ethics)**
 Professional and family guardians are charged with the responsibility of managing guardianships in accordance with the hundreds of statutes in the Texas Estates Code. This overview of the legal and ethical principles of guardianship in Texas will benefit anyone who wants to better understand the application and adjudication process and post-appointment responsibilities that apply to all guardians.

Presenters: **John W. Caldwell, Jr., JD**, *The Law Offices of John W. Caldwell, Jr., San Angelo*; **Shekinah Hammonds, JD**, *Whitehead & Hammonds Law, PLLC San Antonio*
- 8:30 – 10:00 am **Guardianship Program Best Practices (CEU 1.5/ CLE 1.5 Ethics)**
 Guardianship program administrators and staff face unique challenges when starting and managing a guardianship program. These challenges include building relationships with the court system, attorneys, fiduciaries, and other important referral sources; compliance with the Judicial Branch Certification Commission Code of Ethics and Standards of Practice; mentoring and training new guardians; emphasizing alternatives to guardianship. Attendees will interact with the presenters to identify and address challenges unique to management of private and public guardianship programs.

Presenters: **Meghan Hutchinson, MSW, TxCG, NCG**, *Director, Guardianship Program, The Senior Source, Dallas*; **David Vazquez, LMSW, TxCG**, *Program Manager, Bexar County Guardianship Program, San Antonio*; **Catherine Vergara, RN, BSN, CCM, TxCG**, *Chief Executive Officer, CareFor, Austin*
- 9:00 – 10:00 am **Alternatives to Guardianship/Supports and Services Training for Texas Guardianship Judges (Pending Approval for CEU 1.0/ CLE 1.0)**
 Government Code §22.0133 has been amended to require that the Supreme Court, in consultation with the Judicial Branch Certification Commission, is to ensure that at least one hour of training related to alternatives to guardianships and supports and services that are available to a proposed ward is provided to each judge with jurisdiction to hear a guardianship proceeding. This session has been approved by JBCC to meet this requirement and will be provided by an experienced Associate Statutory Probate Judge and Disability Rights advocate.

Presenters: **Hon. Amy Parsons, JD**, *Associate Statutory Probate Judge Harris County Probate Court No. 3, Houston*; **Jeff Miller, JD**, *Policy Analyst, Disability Rights Texas, Austin*
- 9:00 – 11:00 am **Alternatives to Guardianship/Supports and Services Training for Texas Court Investigators/Court Visitors (CEU 2.0/ CLE 2.0)**
 Texas Estates Code §1054.157 is amended to require court investigators to complete at least two hours of training, including one hour of training on alternatives to guardianship and supports and services available to a proposed ward in accordance with Government Code §22.0133 at least every two years. This session has been approved by JBCC to meet this requirement and will be provided by an experienced statutory probate court investigator and guardianship attorney.

Presenters: **Elizabeth Hart, LMSW-IPR**, *Tarrant County Probate Court No. 2, Fort Worth*; **Marie Portales Rodriguez, JD**, *Rodgers, Miller & Rodriguez, P.C., Bryan*



SCHEDULE

- 10:15 – 11:45 am** **Private Professional Guardians Best Practices (CEU 1.5 Ethics)**
Private professional guardianship materialized as a state-credentialed profession after legislative reforms in 2005. Private Professional Guardians are certified and monitored by the Texas Judicial Branch Certification Commission. This workshop will be led by experienced Texas Certified Guardians who will facilitate participant discussions about best practices in the professional guardianship context. There are practice issues, including ethical concerns and legal obligations unique to private professional guardianship, that may arise, confound, and challenge a professional guardian. This advanced interactive practice session will benefit professional guardians of the person and estate as well as trustees, financial officers, medical and other surrogate decision-makers, judges, court staff, attorneys and others involved with Texas Certified Guardians.
- Presenters: **Mary Warner, TxCG, San Antonio; Karen Andersen, JD, The Andersen Law Firm PLLC, San Antonio**
- 11:30 am – 12:45 pm** **Lunch on your own**
- 1:00 – 1:45 pm** **Welcome/TGA Annual Meeting/State of the Association – Courtney Carey, Conference Chair; Catherine Vergara, CareFor, TGA President**
- 1:45 – 3:15 pm** **General Session – Keynote Speaker - Our Mission in the Mission City: Exploring, Identifying and Implementing Alternatives to Guardianship (CEU 1.5/ CLE 1.5)**
In this opening keynote address, the Honorable Oscar Kazen will provide a heartfelt welcome to the Mission City and set the theme for the 2024 TGA Conference. Judge Kazen will discuss the evolution of understanding of alternatives to guardianship and the enhancement that alternatives to guardianship can provide in a person's life. Judge Kazen will discuss specific examples of when alternatives to guardianship have provided the assistance necessary to avoid guardianship, and the circumstances when guardianship may best be applied when alternatives are not available or are not successful.
- Presenter: **Hon. Oscar Kazen, JD, Judge, Bexar Statutory Probate Court No. 1, San Antonio; Anna Torres, Conference Co-Chair Introduce Keynote**
- 3:15 – 3:30 pm** **Break**
- 3:30 – 5:00 pm** **General Session – Incapacity, Guardianship, and What to Do Instead (CEU 1.5/ CLE 1.5 Ethics)**
This session will address how decisional and executive capacity are medically assessed pursuant to Texas Estates Code guidelines. Dr. Hiner will share the most common underlying etiologies and prognoses of incapacity and explain physician recommendations for guardianship versus less restrictive alternatives, including when capacity restoration is appropriate to consider.
- Presenter: **Julia Hiner, MD, University of Texas Health Sciences Center, Houston; Courtney Carey, Conference Co-Chair Introduce Keynote**
- 6:00 – 8:00 pm** **Welcome Reception: Everyone is invited!**



Thursday, September 19

8:30 – 10:00 am

Breakout sessions

A. Innovative Supports and Alternatives (CEU 1.5/ CLE 1.5 Ethics)

Attorneys and Texas certified guardians frequently collaborate to design effective approaches to resolving complicated capacity issues that may lead to guardianship. The presenters, who are a guardianship attorney and private professional guardian, will address one law firm’s template for defining alternatives to guardianship and supports and services, implementation of supports and services to avoid guardianship, and an explanation of how the law firm utilizes this model.

Presenters: **Courtney Carey, TxCG, Hammerle Finley Law Firm, Denton; Virginia Hammerle, JD, Hammerle Finley Law Firm, Denton**

B. If you can’t say anything nice...Handling difficult family members with Integrity and Grace (CEU 1.5/ CLE 1.5 Ethics)

Guardianship proceedings frequently involve a high degree of family conflict or family dysfunction. Some family members oppose the appointment of a 3rd party; however, third-party professional guardians and Trustees must manage turbulent relationships to ethically and effectively manage a case. The presenters will discuss common types of conflict with family members of clients, how to respond authentically, how to ensure the professional guardian and fiduciary are staying within the Minimum Standards of Practice and establishing healthy boundaries with family members.

Presenters: **Lindsey Howell, TxCG, Legacy Guardianship, Dallas; Louis Stefanos, JD, Senior Vice President, Bank of Texas, Fort Worth**

C. Handling Property Transactions: Personal, Real, Mineral Interests (CEU 1.5/ CLE 1.5)

Handling property transactions is an important responsibility of the guardian of the estate. Texas is a state rich in mineral resources, such as oil and gas. Many families and individuals own such interests, both producing and non-producing. Guardians and Trustees often manage Section 1301 Trusts holding such assets. This session is designed to give a basic understanding for Guardians who have never or have seldomly worked with oil and gas interests as part of the assets they will be managing. It will also provide information on selling real and personal property, and the Estates Code provisions for allowing the sales, including case examples and practical tips for unique situations; and information regarding reverse mortgage issues.

Presenters: **Mark Browning, CTFA, Senior Vice President Wealth & Trust Advisor, Extraco Bank Wealth & Trust, Bryan; Dori Wind, JD, Special Counsel, Harris County Attorney’s Office, Houston**

10:00 – 10:30 am

Break

10:30 am – 12:00 pm

Breakout sessions

A. Medical & Legal Considerations in Modifications to and Terminations of Guardianships (CEU 1.5/ CLE 1.5)

The Texas Estates Code establishes varying medical and legal standards for modification and termination of guardianships proceedings. Modifications and terminations can be some of the most beneficial actions taken by a guardianship court when properly handled but can be problematic if handled incorrectly. The presenters, who are an experienced psychiatrist and statutory probate judge, will provide guidance on how to best handle these unique court actions in the best interest of a person before the Court.

Presenters: **Hon. Veronica Vasquez, Judge, Bexar County Statutory Probate Court No. 2, San Antonio; Martha Leatherman, MD, University of Texas School of Medicine, San Antonio**



SCHEDULE

B. *Managing Difficult Wards & Ethical Considerations (CEU 1.5/ CLE 1.5 Ethics)*

The Judicial Branch Certification Commission establishes legal and ethical standards for Texas Certified Guardians. This session will review applicable provisions of the JBCC Minimum Standards and Code of Ethics for Certified Guardians and will provide specific case-related examples of how to apply those standards and Code of Ethics when managing difficult or unique persons who may be under guardianship.

Presenter: **Nathan Peters, JD**, *Custodia Persons, LLC & Law Offices of Nathan Peters, PLLC, Denton*

C. *Working through the Healthcare Maze: A Guide for Financial Professionals in Navigating Health Care Solutions (CEU 1.5)*

An Aging Life Care Professional™ brings specialized knowledge, experience, and a strategic approach to help financial professionals navigate the complexities of the healthcare landscape, optimize costs, and ensure the well-being of their clients. A depletion analysis can help determine how long the client's money will last while simulation multiple different outcomes.

Presenters: **Dion Hobbs**, *Vice President, Senior Advisor, Merrill Lynch Senior Wealth Management, Houston*; **Lina Supnet-Zapata, MBA, CTXG, CMC, TxCG**, *Mir Senior Care Consultants, Austin*

12:00 – 1:30 pm

Lunch on your own
Luncheon for Judges and Court Staff

1:30 – 3:00 pm

Breakout sessions

A. *Effective Presentation of Guardianships in the Courtroom: A Retrospective From 5 Years on the Bench (CEU 1.5/ CLE 1.5)*

The presenter is a former associate probate judge who presided over guardianship matters on a weekly basis. In this session the presenter will educate participants in guardianship proceedings on how to become more confident and effective in court, and on how to avoid common and uncommon mistakes with unintended consequences. This session will benefit attorneys, social workers, private professional guardians, and parties and witnesses in guardianship proceedings.

Presenter: **Lynn Kelly, JD**, *The Blum Firm, Fort Worth*

B. *Using Temporary Guardianships to Avoid Permanent Guardianships (CEU 1.5/ CLE 1.5)*

Permanent guardianship proceedings often result in the permanent deprivation of rights of an alleged incapacitated person. Temporary guardianships, when appropriately utilized, may divert situations away from a permanent taking of rights. In this session the presenter will examine the purpose of temporary guardianships and will provide examples of how a temporary guardianship may be used to avoid permanent guardianships with a special emphasis on recognizing when temporary guardianships are not a viable option. .

Presenter: **Anna Torres, JD**, *Anna Torres Law Firm, San Antonio*

C. *Understanding Trustees and How to Select and Partner with Them (CEU 1.5)*

How do you successfully partner with a local Trustee and capitalize on their resources and expertise? The presenters, all experienced trustees, will answer these questions and more in this interactive session.

Presenters: **Tanya Castro, CFP, CTFA, AEP, SVP**, *Business Development Manager, Cadence Bank Asset Management and Trust, Houston*; **Anna Mendez, JD, ATFA, SVP**, *Trust and Estate Manager, Cadence Bank Asset Management and Trust Austin*; **Felix Meneses, SVP**, *Trust and Estates Manager, Cadence Bank Asset Management and Trust, San Antonio*; **Keith Reep, SVP, CCM**, *Real Estate Manager, Cadence Bank Asset Management and Trust Ft. Worth*

3:00 – 3:30 pm

Break

3:30 – 5:00 pm

Breakout sessions

A. Guardianship Caselaw Update (CEU 1.5/ CLE 1.5)

The presenters will summarize approximately recent guardianship cases decided by the Texas courts of appeal over the past two years. The case summaries will be divided into multiple categories such as less restrictive alternatives, guardian misconduct, and guardian/attorney fees. This session will assist guardians and their attorneys in engaging in best practices and in avoiding traps in the guardianship process.

Presenters: **Steve Fields, JD**, Court Administrator, Tarrant County Probate Court No. 2, Fort Worth; **Dyann McCully, JD**, The Blum Firm, Fort Worth; **Terry W. Hammond, JD**, Director of State Affairs, Texas Guardianship Association, Bryan

B. Supplemental Needs Trusts (SNTs), Pooled Trusts and ABLE accounts as Alternatives to Guardianship (CEU 1.5/ CLE 1.5)

The Texas Estates Code provides numerous alternatives to a guardianship of an estate. The presentation will offer comprehensive insights into special needs trusts, pooled trusts, and ABLE accounts as alternatives or additions to guardianship. This presentation will offer a basic overview of SNTs, and compare the different types of SNTs as well as provide an overview of pooled trusts. The presenters will address how supported decision making, powers of attorney and other alternatives to guardianship work well alongside SNTs. Through real-life examples, comparisons, and practical insights, this session will equip attendees with the tools needed to evaluate SNTs as options. Special emphasis will be devoted to an overview of Texas ABLE accounts - the state's new savings program for Texans with disabilities.

Presenters: **Vanessa Goodson**, Marketing Specialist, Texas Comptroller of Public Accounts, Austin; **Haley Greer, JD**, Master Pooled Trust Director, The ARC of Texas, Austin

C. A Comparative Analysis of §1301 Trusts vs Guardianships of the Estate (CEU 1.5/ CLE 1.5)

Guardians, attorneys, trustees and judges must all weigh and balance the relative benefits and potential adverse consequences of deciding the best way to manage a financial estate. So, what really is a Trust and how do they work? What if the person has a trust? Does my the person need a trust? Is the appointment of a guardian of the estate the best thing to do? What about a §1301 Management Trust? Or both? The presenters will provide advice and guidance as to the best options to consider using varying case scenarios in a practical, easy to understand manner to help attendees better understand the mystery of trusts.

Presenters: **Shawn Hughes, JD**, Senior Vice President, Estate & Trust Officer, Jefferson Bank Trust, San Antonio; **Michelle R. Casillas, JD**, Vice President, Trust Officer, Jefferson Bank Trust, San Antonio



Friday, September 20

8:30 – 10:00 am

Keynote: Judges Panel Discussion (CEU 1.5/ CLE 1.5/ 1.5 SBOT)

Three statutory probate judges will comprise the judicial panel in this interactive session that will focus on current issues in the Texas guardianship courts. Judges Kazen, Vasquez, and Gamboa will offer their thoughts on the state of guardianship practice in their courts and will be available for a question-and-answer session at the end of the panel discussion.

Presenters: **Hon. Oscar K. Kazen, JD**, Judge, Bexar County Statutory Probate Court No. 1, San Antonio; **Hon. Veronica Vasquez, JD**, Judge, Bexar County Statutory Probate Court No. 2, San Antonio; **Hon. Eduardo A. Gamboa, JD**, Judge, El Paso County Statutory Probate Court No. 2, El Paso; **Terry W. Hammond**, Director of State Affairs, Texas Guardianship Association, Bryan (moderator)

10:00 – 10:30 am

Break

10:30 am – 12:00 pm

Guardianship Legislative Update (CEU 1.5/ CLE 1.5)

Jeff Rinard and Terry W. Hammond return to summarize and discuss the impact of legislation passed by the 88th Texas Legislature in 2023 on guardians, guardianship attorneys, guardianship courts and those under guardianship. The speakers will also discuss trends that may impact the 89th Legislative Session in 2025, and the roles that the Texas Guardianship Association and the Office of Court Administration/Judicial Branch Certification Commission may have in shaping guardianship-related legislation in the upcoming legislative session.

Presenters: **Jeff Rinard**, Director, Enterprise Planning and Regulatory Services Texas Office of Court Administration, Austin; **Terry W. Hammond, JD**, Director of State Affairs, Texas Guardianship Association, Bryan

12:00 pm

Closing remarks – **Catherine Vergara**, CareFor, TGA President





Image: Embassy Suites By Hilton San Antonio Landmark

Hotel Information

Embassy Suites by Hilton San Antonio Landmark

5615 Landmark Parkway

San Antonio, TX 78249

Phone: (210) 270-0800

[Hotel Website](#) | [Directions](#)

► **Group Room Rate:** \$189.00 Single/Double Occupancy (plus applicable taxes)

Reservations

To make your room reservation, please [book online](#) or call **1-877-840-8236** and mention **group code TGA** to receive the group rate. Reservations must be made no later than **Friday, August 23, 2024**. Please note that the available room block may fill prior to the aforementioned cut-off date. Reservations made after the cut-off date, or if the room block has been filled, will be accepted based upon availability with the group rate. Be sure to book early!

Important Deadlines

- August 5, 2024 :** Conference registration deadline. Registrations received after this date will be assessed a \$50.00 late processing fee.
- August 19, 2024:** Cancellations must be made in writing to receive a refund. All cancellations will be assessed a \$25.00 cancellation fee. No refunds after this date.
- August 23, 2024:** Hotel group rate reservation cut-off date

Questions?

Contact the TGA Business Office at 713-955-9192 or email Barbara@texasguardianship.org.

REGISTRATION & SPONSORSHIP

Conference Registration Information

► [Register for the 2024 Annual Conference](#)

	Early Bird Registration		Late Registration (after August 5, 2024)	
	Member	Non-Member	Member	Non-Member
Family	\$200	\$300	\$200	\$300
Individual	\$350	\$550	\$450	\$650
Organizational Member	\$350	\$550	\$450	\$550
One Day Only	\$200	\$300	\$200	\$300

Full Registration includes all educational sessions/materials and opening reception on Wednesday, September 18; all educational sessions/materials on Thursday, September 19; and all educational sessions/materials on Friday, September 20. You must be a current Texas Guardianship Association member for the member rates to apply.

Continuing Education

TGA has applied to the Judicial Branch Certification Commission for continuing education credits for Texas Certified Guardians and to the State Bar of Texas for continuing education credits for attorneys. CEU/CLE approvals are pending and will be released prior to the conference.

Sponsorship and Exhibition

► **Sponsor/Exhibitor Registration**

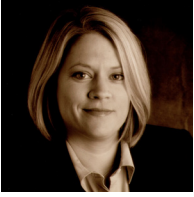
TGA welcomes Sponsors and Exhibitors. Please follow the link above to view the Sponsor/Exhibitor levels for full details and registration. Exhibitors will be provided with a 6ft. draped table. Please contact the TGA Business Office at 713-955-9192 or email Barbara@texasguardianship.org for information.

Cancellations

All cancellations must be made in writing to TGA and received by **August 19, 2024** in order to receive a refund. All cancellations will incur a \$25 non-refundable processing fee. No refunds will be given for cancellations received after this deadline or for 'no shows.'



Image: Embassy Suites By Hilton San Antonio Landmark



Karen Andersen, JD

The Andersen Law Firm PLLC, San Antonio

Karen Andersen attended Albany Law school in Albany, New York. She was licensed to practice law in Texas in 2013 and has practiced almost exclusively as a probate attorney since 2015. Her practice is focused largely on guardianship and estate administration and litigation. Her firm regularly represents private professional and family members serving as guardian.



Mark Browning, CTFA

Senior Vice President Wealth & Trust Advisor, Extraco Bank Wealth & Trust, Bryan

Mark Browning is a native of Beaumont, TX and brings over thirty years of trust and estate experience with banking organizations in Texas and with the Texas A&M Foundation. Currently a Senior Vice President & Trust Officer with Extraco Banks in College Station, TX, he is a graduate of Texas A&M University in College Station with a B.B.A. (Finance). He holds the Certified Trust and Financial Advisor (CTFA) professional designation from the American Banker's Association.



John W. Caldwell, Jr., JD

The Law Offices of John W. Caldwell, Jr., San Angelo

John Caldwell, Jr., graduated from the University of Texas at Austin in 1975 with a degree of Bachelor of Arts with Honors (special Honors in History). He graduated from the University of Texas School of Law in 1978 with a degree of Doctor of Jurisprudence. He practices as an attorney at law and is a member of the Tom Green County Bar Association and the Texas Guardianship Association.



Courtney Carey, TxCG

Hammerle Finley Law Firm, Denton

Courtney Carey is a Texas Certified Guardian, with over 20 years' experience in guardianship services, case management, crisis services, and continuity of care. She spent 15 years working directly with families and individuals through the HCS and TxHmL Medicaid waiver programs. In 2015 she developed and ran the public guardianship program in Denton County. She now works at Hammerle Finley Law Firm where she developed the North Texas Guardianship Services, a private professional guardianship program. As the Director, she provides education, social services, and guardianship services to clients primarily in Denton County. She has a bachelor's in social work from Tarleton State University, and a Master of Science with a degree in Long Term Care, Senior Housing, and Aging Services from the University of North Texas. Courtney has been a member of the TGA since 2015 and is currently serving the Secretary on the Board of Directors.



Michelle R. Casillas, JD

Vice President, Trust Officer, Jefferson Bank Trust, San Antonio

Michelle is a Vice President and Trust Officer for Jefferson Bank, providing clients comprehensive guidance in trust administration and estate settlement. Prior to joining Jefferson Bank, Michelle focused her career on representing families and individuals with their estate planning, probate, and guardianship needs for over 10 years. Michelle served as an adjunct professor for the H-E-B School of Business and Administration at the University of The Incarnate Word where she taught estate planning. Michelle also served as the staff attorney for Bexar County Probate Court No. 2.



Tanya T. Castro, CFP, CTFA, AEP®

SVP Business Development Manager, Cadence Bank Asset Management and Trust, Houston

Tanya Castro is a graduate, Magna Cum Laude, of the University of Houston. She holds a bachelor's degree in finance and is a graduate of the Cannon Financial Institute, completing the Personal Trust Curriculum. She is a Certified Financial Planner by the CFP Board and is a Certified Trust and Financial Advisor (CTFA) from The Institute of Certified Bankers Board. She is a board member of the Houston Estate & Financial Forum, the Houston Business & Estate Planning Council, and the nonPareil Institute-Houston.





Steve Fields, JD

Court Administrator, Tarrant County Probate Court No. 2, Fort Worth

Steven D. Fields has been the Court Administrator/Senior Attorney for Tarrant County Probate Court No. Two, Fort Worth, TX, since 1999. He has been an adjunct professor at Texas A&M School of Law since 2010, teaching Guardianship and Estate Administration classes. He is the past president of the National Guardianship Association (2008); past president of the Texas Guardianship Association (2004-2005); and was the first Texas HHSC Guardianship Director (1998-1999). He served as Court Investigator for the Tarrant County Probate Courts (1993-1998) specializing in the filing of guardianship applications for indigent incapacitated individuals. He has been a licensed attorney since 1987 with a JD degree from the University of Oklahoma, and he specialized in guardianship, estate planning and probate law for various Texas law firms for 6 years. He has a BA degree in English from Oklahoma Christian University.



Hon. Eduardo Gamboa, JD

Judge, El Paso County Statutory Probate Court No. 2

Hon. Eduardo A. Gamboa is a judge for the Probate Court No. 2 in El Paso County, Texas. He was elected to the Probate Court in 2006 and was sworn into the position in January 2007. Gamboa was retained to the seat in subsequent elections. Prior to his election, he was appointed in 1996 to serve as an associate judge for the Mental Health docket. In addition to this role, he also served as a mediator for five years (2001 to 2006). Gamboa received a B.A. in education from the University of Texas at El Paso. A Vietnam-era veteran, Gamboa was drafted into the U.S. Army after graduating from university. After his military service, he continued his studies at the University of Texas at El Paso, where he also earned an M.Ed. in psychology testing and guidance. He then completed a J.D. at the University of Houston Law Center in 1979.



Vanessa Goodson

Marketing Specialist, Texas Comptroller of Public Accounts, Austin

Vanessa Goodson has worked for the Texas Comptroller's Office for 4 years and currently serves as the Outreach Specialist for the state's new Texas ABLE Program. She earned a master's degree in Business from Grantham University. She has 7 years of service with the State of Texas including serving as Business Specialist for the Office of the Governor. Previously, she managed several large-scale Central Texas businesses and served six years in the United States Air Force.



Haley Greer, JD

Master Pooled Trust Director, The ARC of Texas, Austin

Haley Greer is the Director of The Arc of Texas Master Pooled Trust (MPT). Since 2011, Haley has been responsible overseeing operations of the MPT, a pooled supplemental needs trust for people with disabilities. Haley regularly educates individuals and organizations on future planning for people with disabilities, including aspects of person-centered thinking, transition, public benefits, Special Needs Trusts, the Master Pooled Trust, ABLE accounts, and alternatives to guardianship. Haley is a lifelong advocate with and for people with disabilities. Haley received her bachelor's degree in Government from The University of Texas at Austin and her Juris Doctor from Saint Louis University. She was admitted to the Texas Bar November of 2010.



Virginia Hammerle, JD

Hammerle Finley Law Firm, Denton

Virginia Hammerle founded Hammerle Finley Law Firm in 1984, where she has been the managing attorney for the law firm since its inception. She has been Board Certified in Civil Trial Law by the Texas Board of Legal Specialization since 1995, is a Fellow of the Texas Bar Foundation, and has been voted a SuperLawyer every year since 2012. Her firm practices civil litigation, business law, estate, trust, guardianship, and probate matters. Virginia received her Doctor of Jurisprudence from Southern Methodist University School of Law, and her undergraduate degree in finance from the University of Missouri-Columbia. She is an Accredited Estate Planner by the national Association of Estate Planners & Councils. She is certified as an Ad Litem by the Texas Supreme Court of Texas.



Terry W. Hammond, JD

Director of State Affairs, Texas Guardianship Association, Bryan

Terry W. Hammond, J.D., is Director of State Affairs for the Texas Guardianship Association. He is the Guardianship and Probate Attorney for the Brazos County Courts at Law in Bryan, Texas. Mr. Hammond is a past president of the Texas Guardianship Association and the National Guardianship Association, and was Executive Director of TGA from 2018-2023 and of NGA from 2006-2010. Mr. Hammond earned his Bachelor of Science Degree in Education and his Master of Arts Degree in History from Texas A&M University, and his Juris Doctorate from the Texas Tech University School of Law. Mr. Hammond represented family and professional guardians during his 26-year law practice before joining the Brazos County Courts at Law.



Shekinah Hammonds Davis, JD

Whitehead & Hammonds Law, PLLC San Antonio

Shekinah Hammonds received her Bachelors of Arts in Political Science at Texas Lutheran University in 2005 and her Juris Doctor from St. Mary's School of Law in 2011. She holds membership with the San Antonio Bar Foundation and National Academy of Elder Law Attorneys as well as the Texas Bar Association with certification as Attorney ad Litem / Guardian ad Litem. Shekinah interned with the 25th Judicial District Attorney's Office with Former District Attorney, Honorable Judge W.C. Kuykendall in Guadalupe County; worked as Academic Scholar and Constitutional Law Research Assistant for Former Dean Bill Piatt; interned with Honorable Chief U.S. District Judge Fred Biery, United States District Court in Western District of Texas; served as Law Clerk with Office of the Texas Attorney General – Child Support Division; worked as Senior Legal Assistant for Ms. Whitehead from 2006 – 2008; and currently assists Ms. Whitehead with guardianships, probates, heirships, independent and dependent administrations, community administrations, real estate, and estate planning.



Elizabeth Hart, LMSW-IPR

Tarrant County Probate Court No. 2, Fort Worth

Elizabeth Hart has worked with vulnerable persons in the area of guardianship since 2007. She assisted aging seniors on low and fixed incomes to stay independent in their homes and served as a guardian case manager for aged and incapacitated wards of The Senior Source in Dallas. She went on staff with Dallas County Probate Court Investigators' Office in 2010 managing the Court Visitor Program and graduate-level social work interns making annual court visits. In 2016 she continued that work after joining Tarrant County Probate Court No. 2. In 2018 she moved to investigating and assessing the need for guardianship of alleged incapacitated persons. She has worked directly or indirectly on more than 5,000 guardianship cases and helped in restoring some or all rights in about four dozen cases.



Julia Hiner, MD

University of Texas Health Sciences Center, Houston

Dr. Julia Hiner is an academic physician and assistant professor at University of Texas Health Science Center (UTHealth Houston) McGovern Medical School in Houston, Texas. She studied at Texas State University in San Marcos, Texas, and received bachelor's degrees in biology and psychology. She attended University of Texas Medical Branch Medical School in Galveston, Texas, and received her Doctorate of Medicine in 2014. She then completed a three-year residency in Internal Medicine at ChristianaCare in Newark, Delaware, as well as an additional one-year fellowship in Geriatric Medicine at Baylor College of Medicine in Houston, Texas. She is board-certified in both Internal Medicine and Geriatric Medicine. Dr. Hiner is involved with the American Geriatrics Society, the Texas Geriatrics Society, the Texas Guardianship Society, the Institute on Aging, the Texas Elder Abuse and Mistreatment (TEAM) Institute, the Elder Fatality Review Team (EFFORT) Committee, and the McGovern Medical School Curriculum Committee. She is the director of both the Geriatric Medicine Professional Education Committee and the Clinical Competency Committee. Dr. Hiner was selected by Governor Greg Abbott to serve a four-year appointment to the Texas Managed Correctional Health Care Committee.



Dion Hobbs

Vice President, Senior Advisor, Merrill Lynch Senior Wealth Management, Houston

Dion Hobbs brings over 15 years of experience as Vice President and Senior Financial Advisor to The Special Needs Team at Merrill Lynch. His areas of focus include Special Needs Trusts, Guardianships, Trust administration and Probate. Dion began his career as an Assistant Mortgage-backed securities trader with American General in 1999 and later joined JPMorgan Chase at the height of the financial crisis in 2008. He has been with Merrill Lynch since 2018. He earned his B.S. in Business Administration and Minor in Economics from Atlantic Union College. Dion is a community educator for the Alzheimer's Association. He also serves as a Board member for Family Houston and the Texas Guardianship Association.



Lindsey Howell, TxCG

Legacy Guardianship, Dallas

Lindsay has been a Texas Board Certified Guardian since 2011 when she began working for the Texas Dept. of Aging and Disability Services Guardianship Program, now under the umbrella of Health and Human Services. Before becoming a Guardianship, she worked in various other social services such as CPS, education services for children with Autism, and substance abuse treatment centers. Lindsay stumbled into the world of Private Professional Guardianships in 2014, and then formed Legacy Guardianship in 2018.



Shawn Hughes, JD

Senior Vice President, Estate & Trust Officer, Jefferson Bank Trust, San Antonio

Shawn earned his B.B.A. from the Neeley School of Business at Texas Christian University and his J.D. from St. Mary's University School of Law. Shawn joined Jefferson Bank in 2022 and helps lead the Estate Settlement Team for Jefferson Bank Trust. Prior to joining Jefferson Bank, Shawn spent 20 years practicing law in the areas of Probate, Estates, and Guardianships, and he has been in the banking industry for the past 10 years.



Meghan Hutchinson, MSW, TxCG, NCG

Director, Guardianship Program, The Senior Source, Dallas

Meghan Hutchinson currently serves as the Director of the Guardianship Program at The Senior Source in Dallas, Texas. She began as a Guardianship Case Manager with The Senior Source in 2002. She earned her bachelor's degree in Social Work from Texas Christian University where she did an internship in guardianship with the Tarrant County Probate Court No. 2. She completed her master's in Social Work from the University of Wisconsin-Madison. She has been a board member of the Texas Guardianship Association for multiple terms throughout her career including President in 2021. Meghan has been a Texas Certified Guardian since 2007 and a National Certified Guardian since 2002.



Hon. Oscar J. Kazen, JD

Judge, Bexar County Statutory Probate Court No. 1, San Antonio

Judge Oscar J. Kazen is the presiding judge of Bexar County Probate Court No. 1. He previously served as Associate Probate Judge for Bexar County Probate Court No. 1 and presiding judge of Bexar County Court at Law No. 9. He was formerly a managing partner of Kazen & Robberson. As a Criminal Court Judge, Judge Kazen created and oversaw one of Bexar County's first Therapeutic Drug Courts. Shortly after his appointment as Associate Probate Judge, Judge Kazen created and oversaw the implementation of the first fully operational civil AOT court in Texas. Judge Kazen currently serves as Master of the Bench of the Polly Jackson Spencer Probate American Inn of Court. He was appointed by the Supreme Court as a Commissioner for the Texas Judicial Commission on Mental Health. He is Co-Chair of the Bexar County Task Force on Criminal Justice and Behavioral Health, and a member of the Southwest Texas Regional Advisory Council Behavioral Health Committee. Judge Kazen earned his J.D. from Thurgood Marshall School of Law and his B.A. from The University of Texas.



Lynn Kelly, JD

The Blum Firm, Fort Worth

Lynn Waller Kelly, J.D., Partner, received her law degree from Pepperdine University School of Law where she was awarded a full academic scholarship. She has practiced law in North Texas since 1989 and has advocated for clients in front of hundreds of Texas juries. As Associate Judge of Tarrant County Probate Court 2 from 2017 – 2023, she presided over more than 6,000 probate hearings. Her current practice focuses on representing clients in probate matters, estate litigation, and guardianship proceedings throughout North Texas. She also serves as mediator in contested probate litigation matters, bringing her judicial and advocacy experiences to the table to resolve conflicts.



Martha Leatherman, MD

University of Texas School of Medicine, San Antonio

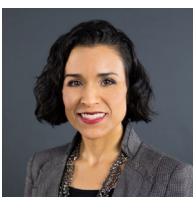
Dr. Leatherman graduated from the University of Texas Medical School at Houston (now the McGovern Medical School) in 1988 and completed her residency and fellowship in Psychiatry and the Psychobiology and Psychopharmacology of Mood Disorders respectively at the UNC Chapel Hill in 1991 and 1993. She served on the faculty of the University of Texas Medical School at San Antonio (now the Long School of Medicine) after which she entered private practice caring for geriatric patients. Dr. Leatherman is Board Certified in adult and geriatric psychiatry. She has extensive experience since 1998 in evaluating adults for guardianship purposes and has been an expert witness in capacity/competency matters as well as estate litigation in multiple venues, and has authored a book and numerous articles on the subject.



R. Dyann McCully, JD

The Blum Firm, Fort Worth

R. Dyann McCully, J.D., Partner, received her J.D. from Southern Methodist University School of Law, graduating with high honors, and her B.F.A. in Radio-TV-Film from Texas Christian University graduating summa cum laude. Dyann is board certified in Estate Planning and Probate Law and is a National Registered Guardian, a Texas Registered Guardian, and a Mediator. Prior to joining The Blum Firm she was a shareholder with Bakutis, McCully & Sawyer, P.C. for over 21 years. Thomson Reuters has consistently recognized Dyann as a Texas Super Lawyer and Fort Worth, Texas magazine has recognized her as one of Tarrant County's Top Attorneys in Probate, Estates and Trusts. Dyann specializes in guardianships, probate litigation, estate planning, and administration of decedent's estates and guardianship estates, and serves as mediator for probate and guardianship matters.



Anna Mendez, JD, ATFA

SVP, Trust and Estate Manager, Cadence Bank Asset Management and Trust Austin

Anna is a licensed attorney who joined Cadence in 2013. She specializes in administration of special needs trusts for beneficiaries with disabilities or special needs who either receive public benefits or want to retain eligibility to receive public benefits in the future. She has specialized knowledge in trust and estates issues involving Medicaid/Medicare, probate and guardianship matters, and elder law. Anna has held memberships with numerous professional groups, including the Estate Planning Councils of Central Texas and San Antonio, the National Academy of Elder Law Attorneys, the Austin Bar Association, and the San Antonio Probate Group. Anna received her J.D. with honors from The University of Texas School of Law and her B.A. summa cum laude in History and Spanish from the University of Notre Dame. Anna recently obtained the Accredited Trust Financial Advisor (ATFA) certification from Campbell University.



Felix J. Meneses

SVP, Trust and Estates Manager, Cadence Bank Asset Management and Trust, San Antonio

Felix Meneses is a graduate of the University of Texas at Dallas with a degree in Finance and Business Administration, and a graduate of the University of Pennsylvania's Wharton School Executive Leadership Certificate Program. He is a Level III Candidate of the Chartered Financial Analyst Program (CFA). He is a former managing director at Bank of America / US Trust. He is experienced in wealth management, portfolio management, and trust administration. He is bilingual and highly experienced in investment management and serving clients in a fiduciary role.





Jeff Miller, JD

Policy Analyst, Disability Rights Texas, Austin

Jeff has held various policy related positions at Disability Rights Texas (DRTx) starting in 2006, including work in the areas of health care access, alternatives to guardianship, and special education. He is currently a Senior Policy Specialist focusing on issues including Guardianship Reform, health care and community integration. Jeff received his law degree from the University of Louisville School of Law and holds a B.A. in Speech Communication from the University of Houston.



Hon. Amy Parsons, JD

Associate Statutory Probate Judge Harris County Probate Court No. 3, Houston

Amy Parsons is the Associate Judge of Harris County Probate Court No. 3 and has served in this capacity since 2016. She hears uncontested guardianship, heirship/administration and civil mental health Assisted Outpatient Treatment dockets. She also hears probate, civil mental health, criminal court ordered medication and ancillary dockets as assigned by the Presiding Judge. Amy Parsons previously served as the court's guardianship court investigator and the court's litigation/mental health staff attorney, and as a court appointed legal guardian at the local Harris county indigent guardianship program. Amy Parsons previously served on the TGA's board of directors. She received a bachelor's in social work from Stephen F. Austin State University and received a master's degree in social work from the University of Houston. She received her Juris Doctorate from South Texas College of Law. She is a licensed master social worker and is a nationally certified guardian.



Nathan Peters, JD

Custodia Persons, LLC & Law Offices of Nathan Peters, PLLC, Denton

Nathan Peters is a sole practitioner in Denton, Collin, Dallas, and surrounding counties, practicing primarily in the areas of Guardianship and Medicaid Planning, Applications, and Appeals. He is a Texas Certified Guardian and the manager of Custodia Persons, LLC, a Texas Guardianship Program. Nathan earned two BBAs in the Management and Economics honors program at Texas Tech University and attended Stetson University College of Law. After law school, he worked in Florida in foreclosure defense, civil litigation, consumer bankruptcy, first-party property insurance defense focusing on sinkhole and water claims, HOA/COA representation, and health care providers. While representing health care providers, he established over 100 guardianships for incapacitated individuals state-wide and participated in over 100 Medicaid Fair Hearings on behalf of Medicaid applicants. He became an amicus briefing author in a Notice of Corrective Action taken by the Centers for Medicare and Medicaid in an administrative appeal by the Texas Health and Human Services Commission.



Jeff Rinard

Director, Enterprise Planning and Regulatory Services Texas Office of Court Administration, Austin

Jeff Rinard serves as Director of Enterprise Planning and Regulatory Services within the Texas Office of Court Administration. He directs the operations for the Judicial Branch Certification Commission. Jeff oversees the operations of the Guardianship Abuse, Fraud, and Exploitation Deterrence Program's statewide compliance monitoring for the courts. He also manages a team of OCA project managers. Jeff has eight years of experience as the Investigations Manager with the Texas Department of Licensing and Regulation and served eleven years with the United States Air Force.



Marie Portales Rodriguez, JD

Rodgers, Miller & Rodriguez, P.C., Bryan

Marie Portales Rodriguez is a civil litigator who practices almost exclusively in the areas of guardianship, probate, estate planning, and mental health law. She has held the Guardianship Attorney Ad Litem, State Bar of Texas certification since 2005. Rodriguez practices in Brazos, Grimes, Leon, Robertson, Washington, Harris, Travis, and Bexar Counties. Rodriguez is a frequent, featured speaker for various facilities and institutions. She also exhibits at the Brazos Valley Senior Expo, the Texas Guardianship Association Annual Conference, and works with and speaks to disabled/diminished capacity adult care groups and protective service providers.





Keith Reep, SVP, CCM

Real Estate Manager, Cadence Bank Asset Management and Trust Ft. Worth

Keith Reep earned a bachelor's degree in animal science from the Texas A&M University. He is a Certified Commercial Investment Member graduate of the CCIM Institute and a graduate of and teacher at the Texas Bankers Association Trust School. He specialized in the creation, management, and performance of commercial and agricultural real estate portfolios for high and ultra high net worth clients and families while maximizing the value and yield of these investments to effectively align with their holistic long- and short-term investment objectives.



Louis Stefanos, JD

Senior Vice President, Bank of Texas, Fort Worth

Louis Stefanos is the Market Manager for the Disability and Elder Trust Solutions team at Bank of Texas. Bank of Texas specializes in administering Special Needs Trusts / Court Created Trusts and Guardianships.



Lina Supnet-Zapata, MBA, CTXG, CMC, TxCG

Mir Senior Care Consultants, Austin

Lina has more than 30 years of experience in the healthcare industry. As Community Educator and Area Director for ten years in the hospice industry, she worked with families and health care providers educating and advocating for increased awareness and better understanding of issues that emerge during end-of-life care. In 2013, she joined Mir Care Consultants, Inc. and is now CEO and co-owner of the firm, which is a Certified Life Care Management firm focusing on Geriatric Care and Special Needs Children and Adults. Lina serves on several boards and is involved with AGE of Central Texas. She is also on the National Board of the Aging Life Care Association. On the local level, she serves on the board of the South Central Chapter ALCA. Lina was awarded the 2022 Joyce Lauck Legacy Award and was recognized as the Aging Life Care Association Chapter Member of the year.



Anna Torres, JD

Anna Torres Law Firm, San Antonio

Anna graduated from the University of Dallas in 1991 with a B.A. in Philosophy and earned her law degree from St. Mary's University in San Antonio. While there, she also earned an M.A. in Theology. Anna founded Anna M. Torres & Associates, P.C. (now Anna Gordon Torres, Attorney At Law, P.C.) in 2008, after almost 15 years of legal experience. As an attorney, she has represented clients in all types of Probate and Trust matters. She has also served as a court-appointed Guardian and Ad Litem in numerous complex and contested guardianships. She is a Board Member of the Texas Guardianship Association and a former Trustee of the Texans Can Academies.



David Vazquez, LMSW, TxCG

Program Manager, Bexar County Guardianship Program, San Antonio

David Vazquez earned a bachelor's degree in Criminal Justice with a minor in Psychology at the University of Texas at El Paso in 2015. He moved to San Antonio in 2016 to pursue a master's degree in social work from The University of Texas at San Antonio. David Vazquez is now a Certified Guardian and Licensed Master Social Worker in the state of Texas. He began his path in social services when he volunteered with individuals with intellectual and developmental disabilities (IDD) in 2011. In 2017, David became a service coordinator for The Alamo Area Council of Government working with the IDD population. In 2019, David began working with the Bexar County Guardianship Program (BCGP). As the program grew, he was promoted to the Bexar County Guardianship Program Manager in 2023 where he leads five guardians.



Hon. Veronica Vasquez

Judge, Bexar County Statutory Probate Court No. 2, San Antonio

Veronica Vasquez, the presiding judge of Bexar County Probate Court No. 2, was born and raised in Houston, Texas. Judge Vasquez graduated with a Bachelor's degree and law degree from the University of Texas at Austin. In 2018, Judge Vasquez became the first woman of color elected to the Probate Courts in Bexar County (San Antonio, Texas). Judge Vasquez co-chairs the Bexar County Elder Abuse and Exploitation Task Force, a collaborative working group dedicated to justice for seniors who are victims of abuse, neglect, and exploitation. Judge Vasquez received the Barbara F. Kishpaugh Elder Advocate Award from the San Antonio Probate and Elder Bar Section. Additionally, she received the San Antonio Women's Chamber of Commerce Rising Star Award and was inducted to the San Antonio Women's Hall of Fame. She is currently the Judicial Co-Chair of the San Antonio Legal Services Association. Judge Vasquez spearheaded the creation of the Polly Jackson-Spencer Probate American Inns of Court and currently serves as the President. She was also recently nominated to the Executive Committee for the National College of Probate Court Judges and will be inducted this year as a Texas Bar Fellow.



Catherine Vergara, RN, BSN, CCM, TxCG

Chief Executive Officer, CareFor, Austin

Catherine Vergara is a Registered Nurse, Certified Case Manager, and a Texas Certified Private Professional Guardian. She is currently the CEO of CareFor, a Care Management, Private Duty Home Care, and Guardianship Firm whose mission is to provide peace of mind through exceptional care and advocacy to the aging, ill, and injured. Catherine has experience both in clinical bedside nursing and leadership development. Under Catherine's leadership, CareFor's guardianship program has grown to serve persons under guardianship in eight counties in Texas. She holds a Bachelors of Science in Biomedical Science from Texas A&M University and a Bachelors of Science in Nursing from Saint Louis University.



Mary Warner, TxCG

Certified Guardian, San Antonio

Mary received her B.A. in 1981 and received her Paralegal Certificate in 1982. From 1982 to 1995, Mary was employed as a paralegal with private law firms, the R.T.C. and the F.D.I.C. in the fields of litigation, real estate, and professional liability. In 1996 after leaving the legal field, Mary began her community service as a volunteer with CASA, youth sports, PTAs, church and working with special needs students. From 2004 to 2012, Mary served as a City Council member for the City of Shavano Park. In 2015, after serving as a Provisional Guardian under Glen Faulk for one year, Mary was certified as a professional guardian. In 2019, Mary and Lou Ann Hayes created Angel Guardians, LLC, a guardianship program and provides guardianship services in Bexar, Medina, Comal, Guadalupe, Kerr, and Kendal Counties.



Dori Wind, JD

Special Counsel, Harris County Attorney's Office, Houston

Dori Wind graduated from the University of South Florida in Tampa, and South Texas College of Law in Houston. She has practiced law for 40 years in Texas, serving as a briefing attorney with the First Court of Appeals, and then as an Assistant Harris County Attorney where she was general counsel to the Harris County Hospital District, the Children's Protective Services Board, and also worked with the Harris County Sheriff's Office. She worked on the committees to create the Harris County Guardianship Program, Harris County's Veterans Court, and the Harris County Senior Justice Assessment Center. She has lectured for many different groups including the Texas District and County Attorney's Association, The Texas Attorney General's Office, and The Texas Hospital Association. She has also had articles published in The Texas Lawyer, The Houston Lawyer, The Texas Prosecutor, and The Houston Chronicle. She is most proud of the fact that she has found resources and funding of about 2 billion dollars for the residents of Harris County and implemented the process to pay guard fees for public guardians under Medicaid which is now part of Texas Medicaid law.