

Estate Planning Council of North Texas

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Website: www.epcnt.org

BREAKFAST MEETING

WEDNESDAY, FEBRUARY 20, 2019

(Breakfast served 7:30-8:00 a.m., Program 8:00-9:00)

NOTE: MEETING LOCATION

[GLENEAGLES COUNTRY CLUB \(5401 West Park Blvd., Plano\)](#)

RESERVATION DEADLINE: WEDNESDAY, FEBRUARY 13, 5:00 p.m.

(PAYMENT MUST BE IN COUNCIL'S OFFICE BY WEDNESDAY, FEBRUARY 13)

MANAGEMENT TRUSTS BETH OWENS



Sponsored by Bank of Texas

With more and more will contests taking place *before* someone dies, 1301 trusts are becoming the most popular least restrictive alternative to guardianships. With the increased amount of 1301 trusts, several road blocks have been discovered along with the differences between a 1301 trustee and a guardian. Beth Owens will address these issues along with setting out a detailed guide for 1301 trusts. She will cover the basics of 1301 trusts, frequently asked questions made by attorneys, and not so frequently asked questions that should be asked. She will explain the requirements involved with the creation of a 1301 trust along with the funding, administration, and closing issues that most commonly appear along the way. By the end of the presentation, you will have a solid road map to guide you down the sometimes treacherous road of court created trusts. As a former probate litigator and estate planner, Beth brings her legal experience to her current role as the National Oversight Manager for the Disability and Elder Trust Solutions team. Beth's extensive experience has given her a unique perspective of the creation and administration of all types of trusts. Born and raised in Dallas, Beth graduated from South Texas College of Law with her J.D., and University of Houston with her L.L.M. in Taxation. Beth joined Bank of Texas in 2011 and currently covers the entire state working with the local trust officers in Dallas, Fort Worth, Sherman, Houston, San Antonio and Austin. She specializes in court created and special needs trusts, but reviews all types of trusts and estates for the Disability and Elder Trust team nationwide.

Continuing education credits pending for this program.

Membership dues do not include meals. **Credit Cards are now accepted online at the website, www.epcnt.org**

Members who have already paid in advance for all meetings for the year MUST REGISTER ON THE WEBSITE (www.epcnt.org) so we will have a count for the number of meals to prepare.

THERE WILL BE 5 MEALS AVAILABLE FOR WALK-INS ON DAY OF MEETING (FIRST COME, FIRST SERVE). ALL OTHER WALK-INS WILL BE "PROGRAM ONLY". NOTE: WALK-IN PRICES ON DATE OF MEETING: Member: \$30 (includes meal); Guest: \$35 (includes meal); Program Only (no meal): \$20

To mail a check, please complete this form, enclose a check (payable to Estate Planning Council of North Texas) and mail to: Estate Planning Council of North Texas, P. O. Box 38553, Dallas, TX 75238-8553.

Member: \$25 (includes meal); Guest: \$30 (includes meal); Program Only (no meal): \$15

Name: _____ \$25 ___\$30 ___\$15

E-Mail: _____

Phone Number: _____

We would like to thank the following Sponsors for their support for 2018-2019: Bank of Texas, Communities Foundation of Texas, Dallas Foundation, Leu & Peirce, Lee Financial Corporation, Lindquist Eisenberg LLP, North Dallas Bank & Trust, Pepkin & Associates, PlainsCapital Bank, Merrill Lynch (The Maynard Group), Texas Bank & Trust and The Catholic Foundation