

**2025
TEXAS NAELA SUMMER CONFERENCE**

**TX NAELA WEDNESDAY EVENING RECEPTION SPONSOR + ELDER LAW FRIDAY
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Legacy Enhancement | legacyenhancement.org/

Legacy Enhancement is a national non-profit corporation established to assist individuals who are disabled or have special needs. The goal of our special needs trust is to protect you and your loved ones' current and future assets by managing funds for supplemental needs and enriching your overall quality of life. Your trust fund will be professionally managed and invested to provide long-lasting security and support. We strive to retain any public entitlements you or your loved one are owed, and work to assist with the needs not covered by benefits or insurance. Legacy Enhancement can assist you with every aspect involved in trust administration; including establishment of the trust, funds disbursement and bill pay, nurse care management, benefits coordination, and much more.

TX NAELA WEDNESDAY LUNCH SPONSOR + ELDER LAW FRIDAY BREAKFAST SPONSOR



Cadence Asset Management & Trust | cadencebank.com/wealth-management

At Cadence, we believe that a customized wealth strategy plays a critical role in helping clients achieve a fulfilling life and lasting legacy. Averaging 20 years of experience each, our administrative advisors listen first to better understand our client's definition of success, their goals and unique family dynamics. Whether it is planning for retirement, establishing a court-created or special needs trust, developing a customized investment strategy or transferring wealth to the next generation, Cadence's innovative wealth management solutions can help clients overcome roadblocks and build a path to financial success. Cadence Trust & Asset Management has full-service office locations in Houston, Austin and Dallas.

ELDER LAW THURSDAY EVENING RECEPTION SPONSOR



Frost Bank | [frostbank.com/](https://www.frostbank.com/)

Frost is the banking, investments and insurance subsidiary of Cullen/Frost Bankers, Inc. (NYSE: CFR), a financial holding company with \$52.0 billion in assets at March 31, 2025. One of the 50 largest U.S. banks by asset size, Frost provides a full range of banking, investments and insurance services to businesses and individuals in the Austin, Corpus Christi, Dallas, Fort Worth, Houston, Permian Basin, Rio Grande Valley and San Antonio regions. Founded in 1868, Frost has helped Texans with their financial needs during three centuries. For more information, visit www.frostbank.com.

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Happy State Bank & Trust Co. | [happytrust.com/](https://www.happytrust.com/)

"The town without a frown," Happy, Texas, got its first bank in 1908, then called First State Bank of Happy. In 1989, 10 local families from Canyon, Texas purchased the \$10 million dollar bank that was listed as the 812th largest bank in Texas. Happy State Bank is now the 20th largest bank with 35 branches in 25 markets, and an asset size of \$3.4 billion. In addition to being named a "Best Banks to Work For" five years in a row by *American Banker*, Happy is ranked the 3rd Best Bank in Texas and the 26th Best Bank in the Nation by *Forbes*. The Happy Trust Company was added in 2002 and currently manages over 400 million dollars in assets. Happy's trust team has over 300 years of combined experience providing expertise in farm and ranch management, securities portfolio services, and mineral interest oversight. Consistent with Happy State Bank's mission, the trust company thrives on building personal relationships with our clients while providing the highest level of fiduciary service.

ELDER LAW THURSDAY BREAKFAST SPONSOR



Medivest Benefit Advisors, Inc. | medivest.com/

Medivest is a national Medicare Secondary Payer (MSP) compliance company. In 1996 we were the first company to professionally administer a Medicare Set-Aside arrangement. For almost 30 years Medivest has been an innovator, creating pre-settlement and post-settlement solutions. Our experienced claims professionals, using state of the art software, adjudicate bills in a quick and timely manner. In addition to Professional Administration, Medivest provides other services including preparing MSA Allocation reports, Lien Resolution, verifying Social Security/Medicare eligibility, and Trust Advisor services. For more information on Medivest please visit www.medivest.com.

ELDER LAW FRIDAY AFTERNOON BREAK SPONSOR



Evan Howell Properties | evanhowell.com/

Evan Howell is a real estate broker in the greater Houston area with a passion for real estate and has been active since 1983. Evan champions his family-owned business, which specializes in property management, probate sales, and real estate services. Evan S. Howell manages a diverse portfolio of commercial, residential, and single-family homes in the greater Houston area with an unparalleled level of service and attention.

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American National Bank & Trust | amnat.com/trust/

American National Bank & Trust strives to provide a comprehensive range of wealth management services to achieve your goals of financial security and success. Only by listening carefully to our clients' dreams, concerns, and unique needs can we develop the appropriate solutions to help achieve each clients' financial and estate planning goals.

Our trust officers have on average more than 23 years of experience and multiple certifications allowing them to deliver the top level of service to our current clients and their future generations. We have expertise in trusts, estate administration, guardianships, 1301 and 142 trusts, special needs trusts, investments, retirement planning, and other individualized wealth management services.

With trust and wealth management offices across the state of Texas and our corporate headquarters in Wichita Falls, Texas, we are able to provide local experts to help your clients with all of their planning needs.

You can find more information about American National Bank & Trust at www.amnat.com.

UT ELDER LAW + TX NAELA LANYARD SPONSOR



Austin Trust Company | austintrust.com/

Austin Trust Company was the first private trust company to be chartered by the Texas Department of Banking, receiving charter number T-001 in 1987. We remain the only locally owned and controlled institution that offers a full range of fiduciary services. Whether you have a straightforward trust, a copious, detailed estate or are establishing a Special Needs Trust to help a loved one living with a disability maintain their eligibility for benefit programs, we are here for you. To find out more about how we strive to go Beyond Wealth Management, please visit us at austintrust.com.

UT ELDER LAW + TX NAELA CONFERENCE SPONSORS



Aging Life Care Association® South Central Chapter | aginglifecare.org/

The Aging Life Care Association® (ALCA) is a non-profit professional membership of Aging Life Care Managers® (ALCMs)-- health and human service specialists who act as a guide and advocate for families caring for aging or disabled adults. ALCMs take a client centered, holistic approach to aging with key knowledge areas including crisis intervention, housing, health and disability, advocacy, family legal needs, financial, and local resources. ALCMs can absorb the non-legal care management issues of a client, allowing attorneys to focus on the legal needs. For a directory of ALCMS, visit aginglifecare.org to locate an Aging Life Care™ Expert.

American Cancer Society



AshBer | ashber.com/

AshBer is an independent insurance agency specializing in Medicaid Compliant Annuities as short as 2 months and long-term care insurance solutions. AshBer partners with attorneys and financial advisors across the country to deliver industry-leading service and premier insurance solutions to their clients offered by "A" rated insurance carriers.



Bank of Texas | bokfinancial.com/

Whether you are setting up a trust, safekeeping account, private foundation, or arranging for estate management services, Bank of Texas offers the full range of fiduciary products in which we serve as the fiduciary or the agent for the fiduciary. Backed by the strength and stability of BOK Financial, a \$33 billion regional financial services company that has been in the trust business since 1918, Bank of Texas provides high touch, personalized fiduciary services through an experienced and credentialed team of local experts. Not only do we serve as neutral third party personal representative for estates, we also administer all types of trusts including revocable, irrevocable, charitable, court created or special needs, with the goal of maximizing tax savings, avoiding probate where possible, and protecting your financial future.



Capital Title of Texas | Tim Allums-Realtor KW Heritage | ctot.com/

Capital Title is the Largest Independent Title Company in the United States. Texas-based and family-owned, we base our business philosophy on a strong set of "Values and Ideals" which guide us toward the goal of delivering excellence to every customer. With over one hundred Texas offices, our closing teams are the most experienced, dependable escrow professionals in the title industry. Debbie Levasseur, with 15 years of experience, is well versed in all types of title transactions. She prides herself on communication and customer service.

Tim Allums has specialized in probate listings for the past several years and is essential when helping evaluate property conditions. He works closely with attorneys, executors, and administrators. Tim is passionate about real estate and sharing his knowledge with others in the community. His wife and co-agent, Becky, works alongside him and has years of experience in the real estate industry. When leisure time presents itself, they enjoy travelling, fast cars, and the pursuit of excellent BBQ.



CareFor

Care Management • Caregiving
Guardianship • Planning

CareFor | carefor.com/

CareFor is a premiere Care Management, Homecare, and Guardianship Program serving Central Texas. We bring compassion and order to the complexity of caring for others. Our team members have been entrenched throughout the medical and caregiving communities in Central Texas for decades. CareFor knows the doctors, service providers, resources and facilities and we have the expertise to support you and your loved ones. Our combined experience and knowledge will help you identify and understand your options and make timely and sound decisions. Whether you need us now, or are planning ahead, CareFor manages the most difficult and immediate needs.



Colvent Group | colventgroup.com/

Trust property is complex, we make it simple. With the Colvent Group HomWize program, large project oversight, and compliance reports, we have you covered. We specialize in nationwide home management and maintenance. Our services span all 50 states. We have forged partnerships with local, licensed, insured contractors to ensure that homes are purchased, repaired, and maintained with excellence...the Colvent way.

HomWize is our exclusive, proactive maintenance program that plays a key role in worry-free property management. Our standard in applying root-cause problem-solving techniques is the cornerstone of our company to ensure all requirements are well defined and executed. Conveniently scheduled HomWize maintenance calls and visits catch small issues early – saving you time, money, and hassle in the long run. HomWize gives insight to know when a major repair or replacement is due, which keeps you, the trustee, in control.



Comerica Bank | comerica.com/wealth-management/comerica-trust.html

Comerica Incorporated (NYSE: CMA) is a financial services company headquartered in Dallas, Texas, and strategically aligned by three business segments: The Commercial Bank, The Retail Bank, and Wealth Management. Comerica, one of the 25 largest commercial U.S. financial holding companies, focuses on building relationships and helping people and businesses be successful, providing banking centers across the country with locations in Arizona, California, Florida, Michigan and Texas. Founded on Aug. 17, 1849, in Detroit, Michigan, Comerica continues to expand into new regions, including its Southeast Market, based in North Carolina, and Mountain West Market in Colorado. Comerica has offices in 15 states and services 13 of the 15 largest U.S. metropolitan areas, as well as Canada and Mexico. Comerica reported total assets of \$77.6 billion at March 31, 2025.

Elder Law Trio Press | store.legal.thomsonreuters.com/law-products/Treatises/Texas-Elder-Law-2022-ed-Vol-51-Texas-Practice-Series/p/106818612

Elder Law Trio Press is a group of three law firms that co-author books. These firms are H. Clyde Farrell of Farrell & Johnson PLLC in Austin, Texas, Patricia "Patty" Flora Sitchler, a solo practitioner in the Law Office of Patricia Flora Sitchler in La Vernia, Texas [retired from solo practice] and Of Counsel to Rainey and Rainey Attorneys at Law LP, and Wright Abshire, Attorneys, A Professional Corporation which includes Wesley E. Wright and Molly Dear Abshire in Bellaire, a city within Houston, Texas. They currently co-author the 2020 edition of Texas Elder Law which is the 51st Volume of the Texas Practice Series published by Thomson.



Executor Support | executorsupport.com/

Executor Support specializes in providing comprehensive estate administration services designed to assist attorneys and their overwhelmed clients through the complexities of probate and estate settlement. We strive to meet our clients where they are, determine their needs, and develop a strategy for supporting them through the estate planning and probate process.

Our services include:

- Probate
 - Inventory and valuation of estate assets
 - Coordination with financial institutions and beneficiaries
 - Resolution of debts and tax obligations
 - Distribution of assets in accordance with the will or trust
 - Management of the sale of real property
- Fiduciary services
 - Power of Attorney
 - Medical Power of Attorney
 - Executor
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By partnering with Executor Support, attorneys can offer their clients a seamless estate administration experience, reducing the burden on families during challenging times. Our commitment to professionalism and attention to detail ensures that every estate is managed with the utmost care and efficiency.

For more information, visit our website at www.executorsupport.com or contact us at (281) 928-1013.



Keever & Wiesenenthal | keeverlaw.com/

Keever & Wiesenenthal is a woman-owned firm that focuses their practice on the intersection of probate, estate planning and title work. Kathleen Wiesenenthal is a 2011 graduate of South Texas College of Law and helps people craft their estate plan and then handles probates. Pam Kever is a 2010 graduate of South Texas College of Law and enjoys solving the puzzles relating to title issues and the issuance of title policies through her association with American Title Company of Houston.



Krause Financial | krausefinancial.com

Krause Financial is an attorney-led firm that provides asset preservation solutions for estate planning and elder law attorneys and their clients. Using our specialized insurance products, resources, and support, we help attorneys streamline the process of advising clients planning for long-term care.

Our main priority is preserving your client's assets in the face of long-term care. Our core products include Medicaid Compliant Annuities, long-term care insurance, and funeral expense trusts. We also offer tax-deferred annuities, whole life insurance, estate trusts, non-Medicaid SPIAs, and refusal letters. Along with our products, we provide case analysis and guidance tailored to each client's unique situation. Our other services include Medicaid application support, fair hearing support, and annuity valuation.

In addition to providing products and services, we are committed to helping attorneys build their practices using our resources and educational tools. We offer live and on-demand webinars, CLE opportunities, state-specific Medicaid resources, our annual Krause Report, video library, white papers, and so much more.



The Special Needs Team - Texas

Merrill: The Special Needs Team - Texas | fa.ml.com/snt

The Special Needs Team at Merrill Lynch is a deeply experienced group of industry professionals. We are dedicated to helping improve the long-term well-being of individuals who are unable to care for themselves by offering financial advice and guidance. Located in multiple offices, we work closely with private professional guardians and family members to provide budgeting, wealth planning and investing designed to assist those who are integral to the care of society's most vulnerable: people with disabilities, elderly individuals with dementia, accident victims and other special needs populations.



Mir Care Consultants | mircareconsultants.com/

Founded in 2004, **Mir Senior Care Management, Inc. & Care Consultants** serves individuals faced with the challenges and complexities of aging and special needs by delivering the highest quality of life care management services. We exist to support our clients by providing personalized planning, consultation, education, advocacy, and resource navigation.

Services include:

Private Professional Guardianship Program

Holistic Care Planning

Licensed Medical Nursing Professionals

Licensed Social Work Professionals

Assess for Less Restrictive Alternatives

Crisis Intervention

Assessment and Client Support (Developmental, Intellectual, Mental Health, Physical Disabilities, Brain Injuries, & Chronic or Serious Illnesses)

Family Support and Guidance

We serve Central Texas, Corpus Christi, the Rio Grande, Houston, Brazos Valley Regions, and surrounding areas. Visit our website at www.mircareconsultants.com or call (512) 615-6116.



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National Care Advisors | nationalcareadvisors.com

National Care Advisors, founded in 2008, is a national nurse consulting firm providing life care planning, quality of life assessment, third-party benefit analysis, educational and litigation consulting as well as case management services for individuals with special needs and disabilities.

We work with attorneys, financial planners, trustees and their client families in all 50 states to navigate the complex financial and legal climate surrounding insurance, government benefits, and future cost projections. Sustainable quality of life should be attainable for any who seek it, no matter their abilities or special needs. Our case managers and consultants work to maximize quality of life within the available scope of resources. Learn more about us at www.nationalcareadvisors.com



Texas ABLE Program - A Savings Program for Texans with Disabilities | texasable.org/

The Texas ABLE Program: A savings program for Texans with disabilities. The Texas Achieving A Better Life Experience (Texas ABLE®) program gives Texans with disabilities and their families the opportunity to save for disability - related expenses in a tax-advantaged ABLE account. Your clients may be able to save for a loved one's disability expenses without affecting eligibility for public benefits.

Funds in an ABLE account can be used to pay for qualified disability expenses that relate to the beneficiary disability and are used to maintain or improve his or her health, independence or quality of life. Texas ABLE is based on federal and state legislation and is maintained by the state through the Texas Comptroller of Public Accounts.

Learn more and enroll online at TexasABLE.org. 844-4TX-ABLE (844-489-2253)

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WealthCounsel | wealthcounsel.com/

WealthCounsel has been helping estate planning and elder law attorneys practice efficiently and confidently for over twenty-five years. From creating intelligent documents to staying on top of changing laws, increasing your skill set, and growing your law practice, WealthCounsel provides world-class resources for all of your professional needs.