

Sarah Patel Pacheco *Shareholder*

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Overview

Sarah Patel Pacheco represents clients in matters of fiduciary litigation, probate, trust and guardianship and general litigation. Sarah's practice focus is on representing fiduciaries and beneficiaries in trial and appellate courts in the State of Texas in matters relating to probate and trust administration and litigation. Her extensive experience includes will contests, will and trust interpretation issues, accounting and administration issues, prosecution and defense of various fiduciary claims, and representation of creditors in probate and trust proceedings.

She works with applicants and contestants in guardianship proceedings, representing personal representatives, trustees, beneficiaries, and guardians in matters relating to the administration of estates, trusts, and guardianships.

Sarah is Board Certified in Estate Planning and Probate Law by the Texas Board of Legal Specialization.

Sarah is the co-author of three legal treatises, serves on the Legal Specialization Estate Planning and Probate Commission, is a frequent speaker and has been repeatedly recognized for her expertise and professionalism. Some of her awards include being named as one of the Top 50 Women Attorneys in Texas, Texas Super Lawyers lists (Thomson Reuters) 2018, 2017, 2008 and 2006, being selected to the 2004-2018 Texas Super Lawyers lists (Thomson Reuters), and included in The Best Lawyers in America (Woodward White, Inc.) in the fields of Trusts & Estates - Litigation (2011-2019), and Trusts & Estates (2007-2019). She was featured as a Profile in Professionalism by Houston Lawyer Magazine (Houston Bar Association) in 2013, and included in the 2014 and 2017 Best Lawyers in Houston, Lawyer of the Year (Woodward White, Inc.) in the field of Litigation-Trusts and Estates Lawyer of the Year.

Education

Southern Methodist University, J.D., 1993

University of Texas at Arlington, B.A. in Accounting, 1990

Practice Areas

Fiduciary Litigation

Estate, Trust, and Wealth Planning

Probate, Trust and Guardianship

Commercial Litigation

Professional Involvement

Admissions

Texas, 1993

United States District Court for the
Southern District of Texas, 1995

- Legal Specialization Estate Planning and Probate Exam Commission (Chair 2006-present, Member 2004-2006)
- State Bar of Texas Guardianship Manual Committee (1997-present)
- Course Director; Building Block of Wills, Trusts and Estate Planning, January 2003, Nuts and Bolts of Wills, Trusts and Estate Planning, June 2005, and Advanced Estate Planning and Probate Course, June 2006; Served on numerous planning committees
- Real Estate, Probate & Trust Section, Member

Awards/ Recognition

Board Certification:

- Board Certified, Estate Planning and Probate Law, Texas Board of Legal Specialization

Recognitions:

- Trusts and Estates (2007-2019) and Litigation – Trusts and Estates (2011-2019), Best Lawyers in America, a Woodward White, Inc. publication
- “Lawyer of the Year” (2017 and 2014), Houston Litigation – Trusts and Estates, Best Lawyers in America, a Woodward White, Inc. publication
- Estate and Trust Litigation (2004-2018), Texas Super Lawyers, a Thomson Reuters publication
- Top 50: Women Texas Super Lawyers (2018, 2017, 2008, 2006), a Thomson Reuters publication
- Top 100: Houston Super Lawyers (2018, 2017), a Thomson Reuters publication
- Women in the Law for Trusts and Estates Law (2016), Best Lawyers in America, a Woodward White publication
- Top Lawyers in Houston (2016, 2005-2008), H-Texas magazine
- Top Lawyers Under Forty (2004), H-Texas magazine
- Texas Rising Stars (2004), Texas Super Lawyers, a Thomson Reuters publication

Educational:

- Member - Phi Delta Phi (Southern Methodist University)

Publications/ Presentations

Publications:

- Co-Author: West Publishing: Texas Probate Practice Guide
- Co-Author: West Publishing: Texas Wills, Trusts and Estate Planning Practice Guide
- Associate Editor: State Bar of Texas: Texas Guardianship Manual

Presentations, Speeches and Panels:

- Speaker/Author: 2019 Probate Academy for County Judges. Topics: *Overview of Guardianships: Role of Guardian and Attorney Ad Litem in Guardianship Proceedings: and Enforcement Actions*, May 2019.
- Moderator/Author: State Bar of Texas; 26th Annual Advanced Estate Planning Strategies Course. Topic: *A Messy Inheritance or an Inherited Mess*, April 2019.
- Moderator/Author: State Bar of Texas; Building Blocks of Wills, Trusts and Estate Planning. Topic: *Administration Issues*, January 2019.
- Speaker/Author: San Antonio Estate Planners Council; Topic: *Fiduciary Pitfalls*, December 2018.
- Panelist: State Bar of Texas; 13th Annual Fiduciary Litigation Course. Topic: *Trial Strategies*, December 2018.
- Speaker/Author: Houston Business and Estate Planning Council; Topic: *Fiduciary Pitfalls*, November 2018.
- Speaker/Co-Author: State Bar of Texas; 42th Annual Advanced Estate Planning & Probate Law Course. Topic: *Options For Seeking Interim Relief In Trust And Estate Litigation*, June 2018.
- Speaker/Author: Austin Bar Association: 32nd Annual Estate Planning & Probate Section All-Day CLE. Topic: *Options For Seeking Interim Relief In Trust And Estate Litigation*, May 2018.
- Speaker/Author: 2018 Probate Academy for County Judges. Topic: *Role of Guardian and Attorney Ad Litem in Guardianship Proceedings*, May 2018.

- Panelist/Author: State Bar of Texas; 25th Annual Advanced Estate Planning Strategies Course. Topic: *Fiduciary Duties*. April 2018.
- Moderator/Author: State Bar of Texas; 19th Annual Course on Building Blocks of Wills, Estates and Probate. Topic: *Administering the Estate*, January 19, 2018.
- Moderator/Author: State Bar of Texas; Building Blocks of Wills, Trusts and Estate Planning. Topic: *Administration Issues*, January 2018.
- Speaker/Author: State Bar of Texas; 12th Annual Fiduciary Litigation Course. Topic: *Options For Seeking Interim Relief In Trust And Estate Litigation*, December 2017.
- Speaker/Author: Texas Banker's Association 2017 Texas Graduate Trust School. Topic: *Fiduciary Litigation*, July 2017.
- Speaker/Author: Texas Banker's Association 2017 Texas Trust Conference. Topic: *Current Trends and Tactics in Fiduciary Litigation*, March 2017.
- Speaker/Author: Corpus Christi Estate Planning Council Meeting. Topic: *Drafting To Avoid Litigation: From a Litigator's Perspective*, February 2017.
- Author: State Bar of Texas; Building Blocks of Wills, Trusts and Estate Planning. Topic: *Administration Issues*, January 2017.
- Speaker/Author: State Bar of Texas; 11th Annual Fiduciary Litigation Course. Topic: *Pre-Lawsuit Evaluation and Investigation of Fiduciary Claims*, December 2016.
- Speaker/Author: Texas Banker's Association 2016 Texas Graduate Trust School. Topic: *Fiduciary Litigation*, July 2016.
- Author/Panelist: State Bar of Texas; 40th Annual Advanced Estate Planning & Probate Law Course. Topic: *Drafting To Avoid Litigation and Exploitation: From a Litigator's Perspective*, June 2016.
- Speaker/Author: 2016 Texas Judicial Probate Academy. Topic: *Litigation in Guardianship*, May 2016.
- Author/Panelist: State Bar of Texas; Advanced Guardianship Law Course. Topic: *Litigation in Guardianship*, April 2016.
- Panelist: State Bar of Texas; Advanced Elder Law Course. Topic: *Medicaid Transfers in a Guardianship Environment*, April 2016.
- Author: State Bar of Texas; Building Blocks of Wills, Trusts and Estate Planning. Topic: *Administration Issues*, January 2016.
- Speaker: State Bar of Texas; Handling Your First (or Next) Guardianship Case. Topic: *Guardian Ad Litem v. Attorney Ad Litem*, December 2015.
- Speaker/Author: University of Texas School of Law, 2015 Estate Planning, Guardianship and Elder Law Conference. Topic: *Guardianship Issues for the Impaired Divorce Client*, August 2015.
- Speaker/Author: Texas Banker's Association 2015 Texas Graduate Trust School. Topic: *Fiduciary Litigation*, July 2015.

- Speaker/Co-Author: State Bar of Texas; 39th Annual Advanced Estate Planning & Probate Law Course Topic: *Administration of Closely-Held Business Interests in Estate and Guardianship Proceedings*, June 2015.
- Speaker/Author: Texas Banker's Association 2015 Intermediate Trust and Estate Administration Seminar Topic: *Fiduciary Litigation*, May 2015.
- Moderator/Author: State Bar of Texas; 21th Annual Advanced Estate Planning Strategies Course. Topic: *Irrevocable and Nonamendable: Post Death Modifications, Reforms, Addressing Litigation and Tax Components*, April 2015.
- Moderator/Author: State Bar of Texas; Building Blocks of Wills, Trusts and Estate Planning. Topic: *Administration Issues*; January 2013.
- Speaker/Author: East Texas Estate Planning Council. Topic: *Capacity and Incapacity: Planning for Clients With Possible Impairments and Related Litigation Issues*, November 2012.
- Speaker/Co-Author: Texas Banker's Association 2012 Estate Administration Seminar. Topic: *Administration From A to Z*, September 2012
- Speaker/Co-Author: Tarrant County Probate Bar Association. Topic: *Peace Treaties: Considerations When Negotiating, Drafting & Enforcing Settlement Agreements*, September 2012.
- Co-Speaker/Author: University of Texas School of Law, 2012 Estate Planning, Guardianship and Elder Law Conference. Topic: *Capacity Assessment: From a Medical and Legal Perspective*, August 2012.
- Speaker/Author: Texas Banker's Association 2012 Texas Graduate Trust School. Topic: *Fiduciary Litigation*, July 2012.
- Speaker/Author: State Bar of Texas; 36th Annual Advanced Estate Planning & Probate Law Course. Topic: *Closing Estates*, June 2012.
- Panelist: State Bar of Texas; 18th Annual Advanced Estate Planning Strategies Course. Topic: *Keeping Your Plan from Getting Waylaid in Administration*, April 2012.
- Speaker/Author: State Bar of Texas; *Keeping Your Plan From Getting Waylaid in Administration*, April 2012.
- Speaker/Author: Austin Bar Association: Estate Planning & Probate Section. *Tricks, Traps, Trials and Tribulations of Fiduciary Litigation*, January 2012
- Speaker/Author: Houston Business & Estate Planning Council; Topic: *Fiduciary Making a Molehill Out of a Mountain*, November 2011.
- Speaker/Author: University of Texas School of Law, 2011 Estate Planning, Guardianship and Elder Law Conference. Topic: *To Apply for Guardianship or Not –Where is the Edge*, August 2011.
- Speaker/Author: Texas Banker's Association 2011 Texas Trust School. Topic: *Fiduciary Litigation: Avoiding (Or Minimizing) The Traps, Tribulations And Trials*, July 2011
- Panelist/Author: State Bar of Texas; 35th Annual Advanced Estate

- Planning & Probate Law Course. Topic: *Tricks, Traps And Other Observations In Fiduciary Litigation – From Both Sides Of The Bench*, June 2011.
- Co-Speaker/Co-Author: Texas Banker’s Association 2011 Trust Administration Seminar. *Discretionary Distributions: Clear as Mud*, May 2011
 - Speaker/Author: Texas Banker’s Association 2011 Trust Administration Seminar. Topic: *Fiduciary Litigation: Avoiding (Or Minimizing) The Traps, Tribulations And Trials*, May 2011
 - Panelist: State Bar of Texas; 17th Annual Advanced Estate Planning Strategies Course. Topic: *Keeping Your Plan From Getting Waylaid in Administration*, April 2011.
 - Panelist/Author: State Bar of Texas; Building Blocks of Wills, Trusts and Estate Planning. Topic: *Administration Issues*, January 2011.
 - Speaker: State Bar of Texas; Trial of a Fiduciary Litigation Trial Notebook Course. Topic: *Executors & Trustees: Considerations And Checklists For Fiduciary Litigation Related To Estate Planning/Probate/Executors/Trustees*, December 2010.
 - Co-Speaker/Author: Central Texas Estate Planning Council; *Fiduciary Making a Molehill Out of a Mountain of Possible Fiduciary Claims From a Planner and Litigator’s Perspective*, October 2010.
 - Speaker/Author: South Texas College Of Law; 25th Annual Wills & Probate Institute. Topic: *Estate Administration From A To Z*, September 2010.
 - Speaker/Author: Victoria Area Estate Planning Council. Topic: *Discretionary Distributions; Clear as Mud*, June 2010.
 - Speaker/Author: Attorney in Tax and Probate. Topic: *Settlement Agreements: Considerations When Negotiating, Drafting and Enforcing Settlement Agreements Involving Probate, Trust and Guardianship Disputes*, April 2010.
 - Moderator/Author: State Bar of Texas; Building Blocks of Wills, Trusts and Estate Planning. Topic: *Administration Issues*, January 2010.
 - Speaker: State Bar of Texas; Trial of a Fiduciary Litigation Case. Topic: *Presenting the Case In Chief -- Plaintiff*, December 2009.
 - Speaker/Author: Brazosport College, Estate Planning Seminar. Topic: *Navigating the Quagmire of Potential Claims against Attorneys in Estate, Trust, Probate & Guardianship*, November 2009.
 - Speaker/Author: University of Texas School of Law, 2009 Estate Planning, Guardianship and Elder Law Conference. Topic: *Avoiding Attorney Liability By Attorneys Practicing in the Areas of Estate Planning, Probate And Trust Law*, August 2009.
 - Speaker/Author: State Bar of Texas; 33th Annual Advanced Estate Planning & Probate Law Course. Topic: *Settlement Agreements: Considerations When Negotiating, Drafting and Enforcing Settlement*

Agreements Involving Probate, Trust and Guardianship Disputes, June 2009.

- Panelist: State Bar of Texas; Train the Trainer Seminar. Voices of Experience: Veteran Speakers Roundtable Discussion, March 2009.
- Speaker/Author: State Bar of Texas; 15th Annual Advanced Estate Planning Strategies Course. Topic: *Planning for Clients With Possible Impairments and Related Litigation Issues*, April 2009
- Speaker: State Bar of Texas; Advanced Guardianship Institute. Topic: *When Is the Guardianship Tipping Point*, March 2009
- Speaker: State Bar of Texas; Building Blocks of Wills, Trusts and Estate Planning. Topic: *Administration Issues*, January 2009.
- Speaker/Author: Texas Society of Certified Public Accountants; 2008 Advanced Estate Planning Conference. Topic: *Fiduciary Litigation: Making a Molehill Out of a Mountain*, August 2008.
- Speaker/Author: State Bar of Texas; 32nd Annual Advanced Estate Planning & Probate Law Course. Topic: *Discretionary Distributions; Clear as Mud*, June 2008.
- Speaker: State Bar of Texas; Fiduciary Litigation. Topic: *Executors & Trustees*, April 2008.
- Speaker/Author: State Bar of Texas; CLE Webcasts. Topic: *Protecting Ourselves: Attorney Liability Issues*, March 2008.
- Speaker: State Bar of Texas; Building Blocks of Wills, Trusts and Estate Planning. Topic: *Estate Administration Issues*, January 2008.
- Speaker/Author: State Bar of Texas; 18th Annual Advanced Drafting Course. Topic: *Trust Fiduciary Provisions: Must, Shall, Will, Won't, May, Could, Should ... Don't?*, October 2007.
- Speaker/Author: South Texas College of Law; Wills & Probate Institute. Topic: *Landmines for Lawyers*, September 2007.
- Speaker/Author: State Bar of Texas; 13th Annual Advanced Estate Planning Strategies Course. Topic: *Protecting Ourselves: Attorney Liability Issues*, April 2007
- Speaker/Author: State Bar of Texas; Advanced Guardianship Institute. Topic: *Roles of Attorneys in Guardianship Proceedings; The Ethics of Representing Applicants, (Alleged) Incapacitated Person or Others*, March 2007
- Speaker/Author: San Antonio Young Lawyers Association; Docket Call in Probate Court 2007. *Practicing In The Estate Planning, Trust And Probate Area in a Post Belt v. Oppenheimer World*, February 2007.
- Speaker/Author: State Bar of Texas; Building Blocks of Wills, Trusts and Estate Planning. Topic: *Texas Probate and Non-Probate Proceedings*, January 2007.
- Speaker/Author: State Bar of Texas; 17th Annual Advanced Drafting Course. Topic: *The Prince and the Pauper: A Look at Trust Distribution Standards*, November 2006.

- Speaker/Author: Houston Bar Association; Probate, Trusts & Estates Section. Topic: *Navigating The Quagmire Of Potential Claims In An Estate, Trust And Guardianship Practice*; October 2006.
- Speaker/Author: South Texas College of Law; Wills & Probate Institute. Topic: *Navigating The Quagmire Of Potential Claims Against Lawyers Who Represent Fiduciaries And Other Clients In An Estate, Trust And Guardianship Practice*, September 2006.
- Speaker/Author: South Texas College of Law; Wills & Probate Institute. Topic: *Navigating The Quagmire Of Potential Claims Against Lawyers Who Represent Fiduciaries And Other Clients In An Estate, Trust And Guardianship Practice*, September 2006.
- Speaker/Author: University of Texas School of Law, 8th Annual Intermediate Estate Planning, Guardianship and Elder Law Conference. Topic: *Management Plans: Getting the Mountain Back Into the Molehill*, August 2006.
- Speaker: University of Texas School of Law, 8th Annual Intermediate Estate Planning, Guardianship and Elder Law Conference. Topic: *Guardianships: Recognizing Various Fiduciary Relationships, Duties & Issues that Commonly Arise in Guardianship Proceedings and Related Litigation*, August 2006.
- Speaker/Author: Tarrant County Probate Bar Association. Topic: *Navigating The Quagmire Of Potential Claims Against Lawyers Who Represent Fiduciaries And Other Clients In An Estate, Trust And Guardianship Practice*, August 2006.
- Speaker/Author: The Center For American And International Law. Topic: *Planning For Incapacity and Other Litigation Issues*, May 2006.
- Speaker/Author: University of Houston School of Law; Wills & Probate Institute. Topic: *Don't Become a Defendant! Avoiding the Thicket of Potential Claims Against Lawyers In The Estate, Trust And Guardianship Areas*, May 2006.
- Speaker/Author: State Bar of Texas; Building Blocks of Wills, Trusts and Estate Planning. Topic: *Texas Probate and Non-Probate Proceedings*, January 2006.
- Speaker/Author: University of Houston School of Law; Wills & Probate Institute. Topic: *Navigating The Quagmire Of Potential Claims Against Lawyers Who Represent Fiduciaries And Other Clients In An Estate, Trust And Guardianship Practice*, July 2005.
- Speaker/Author: State Bar of Texas; 29th Annual Advanced Estate Planning & Probate Law Course. Topic: *Tax Considerations of Settlement Agreements & Judgments*, June 2005.
- Speaker/Author: Amarillo Area Estate Planning Council's Fourteenth Annual Institute on Estate Planning. Topic: *Family Settlement Agreements: Considerations When Negotiating, Drafting and Enforcing Settlement Agreements Involving Probate, Trust and Guardianship Disputes*, May 2005.

- Speaker/Author: State Bar of Texas; Guardianship Course 2005. Topic: *Administering the Guardianship: Beyond the Basics*, April 2005
- Speaker/Author: San Antonio Young Lawyers Association; Docket Call in Probate Court 2005. Topic: *Family Settlement Agreements*, February 2005.
- Speaker/Author: Houston Bar Association: 2005 Wills & Probate Institute, Advanced Course. Topic: *Navigating the Quagmire of Fiduciary Responsibilities and Liabilities*, February 2005.
- Speaker: State Bar of Texas; Building Blocks of Wills, Trusts and Estate Planning. Topic: *Administration of Estates and Trusts*, January 2005.
- Speaker/Author: State Bar of Texas; 15th Annual Advanced Drafting Course. Topic: *Preserving The Grantor's Intent Under Changing Circumstances And Litigious Beneficiaries: A Planner And Litigator's Perspective*, November 2004.
- Speaker/Author: Texas Banker's Association 2004 Estate Administration Seminar. Topic: *Family Settlement Agreements*. October 2004.
- Speaker/Author: Tarrant County Probate Bar Association 3rd Annual Probate Litigation Seminar. Topic: *Papering the Deal; Release, Indemnities and Agreements*, September 2004.
- Speaker/Author: University of Texas School of Law, 6th Annual Intermediate Estate Planning, Guardianship and Elder Law Conference. Topic: *Roles and Responsibilities of Guardianship*; August 2004.
- Speaker/Author: Houston Bar Association: Continuing Legal Education Programs, Spring/Summer 2004 Seminars. Topic: *Dealing with Probate Issues in Personal Injury and Similar Litigation*, July 2004.
- Speaker/Author: State Bar of Texas; 28th Annual Advanced Estate Planning & Probate Law Course. Topic: *Hot Topics for the Incapacitated, Marriage, Divorce, Estate Planning, Seeking Restoration, and other Actions by Person's Subject to a Guardianship Proceeding*, June 2004.
- Speaker/Author: University of Houston School of Law; Wills & Probate Institute. Topic: *Dependent Administrations*, May 2004.
- Speaker/Author: State Bar of Texas; Fiduciary Litigation Course. Topic: *Guardianships: Recognizing Various Fiduciary Relationships, Duties & Issues that Commonly Arise in Guardianship Proceedings and Related Litigation*, May 2004.
- Speaker/Author: State Bar of Texas; Elder Law Institute. Topic: *What Can a Ward Do?*, April 2004
- Speaker: State Bar of Texas; Building Blocks of Wills, Trusts and Estate Planning. Topic: *Administration of Estates and Trusts*, January 2004.
- Speaker/Author: Tarrant County Probate Bar Association 2nd Annual Probate Litigation Seminar. Topic: *Settlement Agreements, Considerations When Negotiating, Drafting & Enforcing Settlement Agreements*, October 2003
- Speaker/Author: State Bar of Texas; 27th Annual Advanced Estate

- Planning & Probate Law Course. Topic: *Peace Treaties: Considerations When Negotiating, Drafting & Enforcing Settlement Agreements*, June 2003.
- Speaker/Author: South Texas College Law; Elder Law Estate Planning, Special Needs Trusts and Guardianships Program. Topic: *“Non” Sense and Sensibilities - A Practical Review of the Procedural and Evidentiary Issues in Contested Guardianship Litigation and Settlement*, May 2003.
 - Speaker/Author: State Bar of Texas; Texas Minority Attorney Program. Topic: *Guardian Ad Litem: Avoiding the Pitfalls*, April 2003.
 - Speaker/Author: Dallas Estate Planning Council. Topic: *We All Become Inflexible When We Die: Pre-Death Planning To Provide For Management, Flexibility, Control and Protection From Interlopers*, March 2003.
 - Speaker/Author: 53rd Tennessee Federal Tax Institute. Topic: *The Ethical, Legal & Practical Considerations When Representing Clients With Questionable Capacity*, December 2002.
 - Speaker: Fort Bend Estate Planning Council. Topic: *Court Created Section 867 Trusts as an Alternative to Guardianship*, August 2002.
 - Speaker/Author: State Bar of Texas; 26th Annual Advanced Estate Planning & Probate Law Course. Topic: *What I Have Learned in the Guardianship Trenches*, June 2002.
 - Speaker/Author: South Texas College Law; Representing the Elderly Client Institute. Topic: *Case Law and Statutory Update*, May 2002.
 - Speaker/Author: State Bar of Texas; Elder Law Institute. Topic: *Advanced Directives – Beyond the Basic Forms*, March 2002.
 - Speaker: State Bar of Texas; Building Block of Wills, Trusts and Estate Planning. Topic: *Probate Law for Estate Planners Who “Don’t Do Probate”*, January 2002.
 - Author: Texas Lawyer. Article. *Your Mission, Should You Choose to Accept It: How to Manage the Risks and Rewards as a Fiduciary*, December 2001.
 - Speaker/Author: State Bar of Texas; 12th Annual Advanced Drafting Course. Topic: *Drafting for Incapacity – Going the Extra Mile for Your Client*, November 2001.
 - Speaker/Author: South Texas College Law; 15th Annual Wills and Probate Institute. Topic: *Guardianships Litigation*, September 2001.
 - Author: South Texas College Law; 15th Annual Wills and Probate Institute. Topic: *Duties of the Attorney Ad Litem and the Guardian Ad Litem*, September 2001.
 - Speaker/Author: State Bar of Texas; 25th Annual Advanced Estate Planning & Probate Law Course. *The Role of the Ad Litem and Contested Issues*, June 2001.
 - Speaker/Author: Southwestern Legal Foundation; 40th Annual Institute on Wills & Probate; *Client Incapacity or Questionable Capacity*, May 2001.

- Speaker: State Bar of Texas; Building Block of Wills, Trusts and Estate Planning. Topic: *Probate Law for Estate Planners Who “Don’t Do Probate”*, January 2001.
- Speaker/Author: University of Houston; Handling Insurance and Tort Claims. Topic: *Dealing with Probate: Recognizing and Avoiding the Traps*, December 2000.
- Author: Houston Chronicle. Article: *Good Estate Plan Includes More Than a Will*, October 27, 2000.
- Speaker/Author: Houston Bar Association; Guardianship and Elder Law Issues For The Practitioner & Ad Litem. Topic: *Disqualification, Resignation and Removal of a Guardian*, October 20, 2000.
- Speaker/Author: South Texas College Law; 14th Annual Wills and Probate Institute. Topic: *Current Issues in Guardianship Administration and Litigation*, September 2000.
- Author: State Bar of Texas Real Estate, Probate and Trust Law Reporter, Vol. 38, No. 4. Article: *The Preparation and Trial of Contested Guardianships*, July, 2000.
- Speaker/Author: State Bar of Texas; 24th Annual Advanced Estate Planning & Probate Law Course. Topic: *Contested Guardianships*, June 2000.
- Speaker/Author: Houston Bar Association; Wills & Probate Institute. Topic: *Current Issues in Guardianship Litigation*, February, 2000.
- Speaker/Author: San Antonio Young Lawyers Association; Docket Call in Probate Court 2000. Topic: *Contested Guardianships*, January, 2000.
- Author: San Antonio Young Lawyers Association; Docket Call in Probate Court 2000. Topic: *How to Initiate a Guardianship*, January, 2000.
- Speaker/Author: South Texas College Law; 13th Annual Wills and Probate Institute. Topic: *Peace Treaties; Creation, Drafting and Enforcement Considerations*, September 1999.
- Speaker Houston Bar Association 1998-1999 Continuing Legal Education Programs. Topic: *Alternatives to Formal Probate*, July 1999.
- Speaker/Author: State Bar of Texas; 23rd Annual Advanced Estate Planning & Probate Law Course. *Settlement Agreements*, June 1999.
- Speaker: State Bar of Texas; Elder Law Institute. Ethics Panel: *Ethical Issues in the Practice of Elder Law*, February 1999.
- Author: State Bar of Texas Real Estate, Probate and Trust Law Reporter, Vol. 37, No. 2. Article: *The Preparation and Trial of Contested Guardianships*, January, 1999.
- Speaker: Houston Bar Association; Probate and Family Law Bench Bar Conference. Panel: *Jurisdictional Overlap: A Judicial Face-Off*, October 1998.
- Speaker/Author: University of Houston; Handling Insurance and Tort Claims. Topic: *Dealing with Probate: Recognizing and Avoiding the Traps*, September 1998.

- Speaker/Author: State Bar of Texas; 22nd Annual Advanced Estate Planning & Probate Law Course. *Contested Guardianships*, June 1998.
- Speaker/Author: Houston Bar Association; Probate, Trusts & Estates Section. Topic: *The Creation, Administration, and Termination of Temporary Administrations*, May 1998.
- Speaker: State Bar of Texas; Guardianship Institute. Topic: *The ADA and its Application to the Incapacitated Individual*, February/March 1998.
- Speaker/Author: State Bar of Texas; Guardianship Institute. Topic: *Contested Guardianships/ADR*, February/March 1998.
- Author: Texas Lawyer. Article: *Probate's Top Ten Changes*; January 1998.
- Speaker: Advanced Estate Planning and Probate Law Seminar for Attorneys, Legal Assistants and Other Professionals. Topic: *Settlements and Trust Modifications: Tax Considerations*; October 1997.
- Speaker/Author: South Texas College Law; 11th Annual Wills and Probate Institute. Topic: *Guardianship Laws: The Basics*; September 1997.
- Speaker/Author: University of Houston; Handling Insurance and Tort Claims. Topic: *Dealing with Probate: Recognizing and Avoiding the Traps*; August/September 1997.
- Author: Texas Lawyer. Article: *Representing the Potentially Incapacitated*, April 1997.
- Speaker/Author: State Bar of Texas; Wills & Probate. Topic: *Guardianships: Guardianship of Estate and Person, and Ad Litem Appointments*, February 1997.
- Author: Texas Lawyer. Article: *Avoiding Sudden Death in Probate Court*, September 1996.
- Author: University of Houston; Handling Insurance and Tort Claims. Topic: *Dealing with Probate: The Ten Worst Traps (or How to Avoid Sudden Death in the Probate Courts)*, September 1996.
- Author: Houston Bar Association; Guardianships and Ad Litem in the Probate Courts. Topic: *Trying a Contested Guardianship*, September 1995.
- Author: University of Houston; Handling Insurance and Tort Claims. Topic: *Dealing with Probate: The Ten Worst Traps*, August 1995

Associations/ Affiliations

American Bar Association:

- Real Property, Probate and Trust Law and Litigation Sections; Member (1993-present)

Houston Bar Association:

- Probate, Trust & Estate Section Council: Probate, Trust & Estate Section Council: Chair 2009-2010; Chair Elect 2008-2009; Vice-Chair 2007-2008; Secretary 2006-2007; Treasurer 2005-2006, Councilmember 2000-2005
- CLE Committee: Co-Chair: 2008-2009; Seminars Subcommittee Co-Chair 2007-2008; Institutes Subcommittee Co-Chair 2006-2007
- Elder Law Committee: 2007-2008
- Judicial Polls Committee: 2008-2009
- Houston Bar Foundation: Fellow (elected 2004)

Other Associations:

- Houston Young Lawyers Association: Fellow (elected 2000); Co-Chair of Elder Law Committee (1998- 2003)
- Texas Young Lawyers Association: Needs of Senior Citizens Committee (1999-2003)
- Generation-X Estate Planning Forum: Member (1999-present)
- Houston Estate and Financial Forum
- Women Attorneys in Tax and Probate: Vice President, Programs (2000-2001); C.L.E. Officer (1999-2000)
- Disabilities & Elder Law Attorneys: Member