

DM

PROBATE COURT 4

NO. 412,249-401

ESTATE OF § IN PROBATE COURT
NELVA E. BRUNSTING, §
DECEASED § NUMBER FOUR (4) OF
§ HARRIS COUNTY, TEXAS
§

CARL HENRY BRUNSTING, § IN PROBATE COURT
Individually and as independent §
executor of the estates of Elmer H. §
Brunsting and Nelva E. Brunsting §

v. §

ANITA KAY BRUNSTING f/k/a §
ANITA KAY RILEY, individually, §
as attorney-in-fact for Nelva E. § NUMBER FOUR (4) OF
Brunsting, and as Successor Trustee §
of the Brunsting Family Living Trust, §
the Elmer H. Brunsting Decedent's §
Trust, the Nelva E. Brunsting §
Survivor's Trust, the Carl Henry §
Brunsting Personal Asset Trust, and §
the Anita Kay Brunsting Personal §
Asset Trust, AMY RUTH §
BRUNSTING f/k/a AMY RUTH §
TSCHIRHART, individually and as §
Successor Trustee of the Brunsting §
Family Living Trust, the Elmer H. §
Brunsting Decedent's Trust, the §
Nelva E. Brunsting Survivor's Trust §
the Carl Henry Brunsting Personal §
Asset Trust, and the Amy Ruth §
Tschirhart Personal Asset Trust; §
CAROLE ANN BRUNSTING, §
individually and as Trustee of the §
Carole Ann Brunsting Personal §
Asset Trust; and as a nominal §
Defendant only, CANDACE §
LOUISE CURTIS § HARRIS COUNTY, TEXAS

DESIGNATION OF EXPERT WITNESSES

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TO THE HONORABLE JUDGE OF SAID COURT:

COMES NOW, Carole Ann Brunsting, daughter of Nelva E. Brunsting, Deceased; a beneficiary of the Estate of Nelva E. Brunsting, Deceased; and a beneficiary of The Brunsting Family Living Trust, and hereby designates as her expert witnesses at the trial of the above cause any of the persons identified herein and, additionally, reserves the right to call any person designated by any other party as an expert or as a witness or person with relevant facts in this proceeding:

1. Ms. Darlene Payne Smith
Ms. Lori A. Walsh
Crain, Caton & James
1401 McKinney, Suite 1700
Houston, Texas 77010-4035
713.658.2323
713.658.1921 (Facsimile)

Ms. Smith and Ms. Walsh will testify as to the reasonableness and necessity of attorneys' fees regarding the issues in this cause, which were incurred by Carole Ann Brunsting. Their testimony will be based on their experience in handling same or similar matters in and around Harris County and the State of Texas. Redacted fee and expense invoices and/or reports will be produced prior to trial. Ms. Smith and Ms. Walsh are of the opinion that fees charged by them, fellow shareholders and associates, and paralegals under their supervision, and expenses incurred by Carole Ann Brunsting with respect to these proceedings are reasonable, necessary, equitable and just, and will be based on their review of redacted fee and expense invoices and/or reports, the pleadings, discovery, correspondence exchanged between counsel and with the Court, evidence adduced in discovery and at trial, and all other documents in any way relating to this proceeding. After review of the above, they may also opine as to whether the attorneys' fees of other parties are reasonable, equitable and just.

Their opinions will also be based on, but not limited to, the following relevant factors:

- a. the time and labor required, the novelty and difficulty of the questions involved, and the skill requisite to perform the legal service properly;
- b. the fee customarily charged in Harris County, Texas, for similar legal services;
- c. the amount involved and the results obtained;
- d. the time limitations imposed by the circumstances;

- e. the experience, reputation, and ability of the lawyer or lawyers performing the services;
- f. likelihood that the acceptance of the particular employment will preclude other employment by the lawyer;
- g. the nature and length of the professional relationship with the client; and
- h. the results obtained.

A copy of Ms. Smith's and Ms. Walsh's resumes are attached hereto as **Exhibits A and B**.

- 2. Carole Ann Brunsting reserves the right to cross examine each expert timely designated by any other party.
- 3. Carole Ann Brunsting reserves the right to designate additional experts, the need for whom are not yet known, or who are rebuttal experts.

Respectfully submitted,

CRAIN, CATON & JAMES
A Professional Corporation

By: 

DARLENE PAYNE SMITH
State Bar No. 18643525
dsmith@craincaton.com
LORI A. WALSH
State Bar No. 24084038
lwalsh@craincaton.com
Five Houston Center
1401 McKinney, Suite 1700
Houston, Texas 77010-4035
(713) 658-2323
(713) 658-1921 Facsimile

Attorneys for Carole Ann Brunsting

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CERTIFICATE OF SERVICE

This is to certify that a true and correct copy of the foregoing instrument was forwarded
to:


Ms. Bobbie G. Bayless
BAYLESS & STOKES
2931 Ferndale
Houston, Texas 77098
(713) 522-2218 - facsimile

Ms. Nicole Sain Thornton
OSTROM SAIN
5020 Montrose Blvd., Ste. 310
Houston, Texas 77006
(713) 863-1051 - facsimile

Mr. Stephen A. Mendel
Mr. Bradley E. Featherston
THE MENDEL LAW FIRM, L.P.
1155 Dairy Ashford, Suite 104
Houston, Texas 77079
(281) 759-3214 - facsimile

Ms. Amy Ruth Brunsting
2582 Country Ledge
New Braunfels, Texas 78132

by facsimile, hand delivery, and/or certified mail, return receipt requested, on this 1st day of
December, 2014.



DARLENE PAYNE SMITH
LORI A. WALSH

12012014:1530:P0187



DARLENE PAYNE SMITH

Crain, Caton & James, P.C.
1700 Five Houston Center
Houston, Texas 77010-4035
713-752-8640
Email - dsmith@craincaton.com

**CRAIN
CATON
— & —
JAMES**

EDUCATION

Bachelor of Science: Criminal Justice, University of Houston (Magna Cum Laude)
Doctor of Jurisprudence, University of Houston Law Center

MEMBERSHIPS & CERTIFICATIONS

Adjunct Professor – South Texas College of Law, 2014
Adjunct Professor – South Texas College of Law, 2013
Member – State Bar Pattern Jury Charge Committee, 2012
Adjunct Professor – South Texas College of Law, 2012
Member – State Bar Pattern Jury Charge Committee, 2011
Adjunct Professor – South Texas College of Law, 2011
Member – State Bar Pattern Jury Charge Committee, 2010
Adjunct Professor – South Texas College of Law, 2010
Co-Chair – Houston Bar Association Elder Law Committee, 2010
Texas Bar Association;
Houston Bar Association;
Texas Bar Foundation;
Probate Legislative Sub-Committee -- Houston;
Past President – Women Attorneys in Tax and Probate;
Former Vice President – Disability and Elder Law Lawyers Association;
Planning Committee – Elder Law Section, State Bar;
Planning Committee – Wills and Probate Institute;
Elder Law Committee;
Certified by the State Bar of Texas Pursuant to Texas Probate Code § 647A as Ad Litem
Former Trust Committee Member - NAELA

PERSONAL

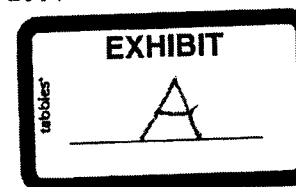
Married – Michael David Smith;
Three Children – Stephan, Coleman and Hallie;
Hobbies - Singing, pistol shooting, tennis and squash.

SPEAKER/AUTHOR

Speaker: 63rd Annual Education Conference and National Forum 2014 – “Estate Administration A to Z”, October 2-4, 2014

Speaker/Co-Author: Advanced Elder Law and Advanced Guardianship Law Course 2014 – “Criminal Aspects of Guardianship and Mental Commitment”, April 3-4, 2014

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- Speaker/Author: Transitional Learning Center, Galveston, Texas – “Powers of Attorney, Common Law Spouses and Guardianships”, August 30, 2013
- Speaker: Criminal Justice Symposium and Community Day, Houston, Texas
- Speaker: Texas College of Probate Judges, San Antonio, Texas – “Practical Aspects of Guardianship Law”, September 6-8, 2012
- Speaker/Author: State Bar College, Summer School 2012, Galveston, Texas – “Will and Guardianship Contests (Limine, Voir Dire, Opening, Preserving Errors, Charge and Closing)”, July 19, 2012
- Speaker/Author: Houston Northwest Bar Association, Houston, Texas – “Handling Insolvent Estates and the Claims Process”, July 18, 2012
- Speaker/Author: Lorman Education Services, Houston, Texas – “Fiduciary Administration (Common Sense Approach)”, April 26, 2012
- Speaker/Author: DELAA, Houston, Texas – "Fiduciary Litigation – Practical Approach", February 16, 2012
- Speaker/Author: Wills & Probate Institute, Houston, Texas – "Trial of a Guardianship", September 22-23, 2011
- Speaker/Author: Advanced Estate Planning and Probate Course, Fort Worth, Texas – "Probate, Guardianship and Trusts, Where are we Now?", June 8-10, 2011
- Speaker/Author: Advanced Guardianship Law Course, Houston, Texas – "Trial of a Guardianship", April 8, 2011
- Speaker/Author: National Academy of Elder Law Attorneys, Inc., Orlando, Florida – "Divorce and Annulment In the Elderly", May 12, 2010
- Speaker: Sharpstown Rotary Club, Houston, Texas – "Estate Planning No Matter How Big or How Small", February 2, 2010
- Speaker/Author: Trial of a Fiduciary Litigation Case, Fredericksburg, Texas – "Getting to Victory: Winning Techniques in Fiduciary Litigation", December 17-18, 2009
- Speaker: St. Edward Catholic Church, Spring, Texas – "Estate Planning No Matter How Big or How Small", October 25, 2009
- Speaker: State Bar of Texas Webcast, Austin, Texas – "Guardian Ad Litem in a Personal Injury Case: Deal or No Deal, Austin, Texas", May 14, 2009
- Speaker/Author: State Bar of Texas Advanced Guardianship Course, Houston, Texas – "Complex Family Matters in Guardianship", March 2009

- Speaker/Author: Attorneys In Tax & Probate – "Drafting and Entering Judgments", March 3, 2009
- Advisory Committee: 2009 Advanced Elder Law and Guardianship Courses
- Speaker/Author: Tarrant County Probate Bar Association – Sixth Probate Litigation Seminar, Ft. Worth, Texas, "Expert Testimony", September 19, 2008
- Speaker: Estate Planning, Guardianship and Elder Law Conference, Galveston, Texas, "Ask The Experts: Guardianship Topics including Medical Issues in Guardianships", August 14-15, 2008
- Speaker/Author: Advanced Estate Planning and Probate Course, Dallas, Texas, "Drafting and Entering Judgments", June 11-13, 2008
- Speaker/Author: Texas College of Probate Judges Regional Workshop, Corpus Christi, Texas, "The Role of The Ad Litem", March 28, 2008
- Speaker/Author: Texas College of Probate Judges Regional Workshop, Corpus Christi, Texas, "Show Cause, Contempt, Surcharge, and Injunctive Actions", March 28, 2008
- Speaker/Author: State Bar of Texas Advanced Guardianship Course, Dallas, Texas, "Medical Experts: Can Yours Withstand Cross?", March 7, 2008
- Speaker/Author: National Business Institute Fundamentals of Trust Administration, Houston, Texas, "Major Provisions of a Trust", December 7, 2007
- Speaker/Author: National Business Institute Fundamentals of Trust Administration, Houston, Texas, "Essential Steps in Trust Termination", December 7, 2007
- Speaker: National Business Institute Fundamentals of Trust Administration, Houston, Texas, "Overcoming Ethical Challenges", December 7, 2007
- Speaker/Co-Author: State Bar of Texas Advanced Drafting Course for Estate Planning and Probate, Houston, Texas, "File Documentation, Retention & Destruction: i.e. Will Your Notes Nail You?", October 25, 2007
- Speaker/Co-Author: Trust Administration in Texas, Houston, Texas, "Fiduciary Litigation", July 17, 2007
- Speaker/Author: Trust Administration in Texas, Houston, Texas, "Fiduciary Administration", July 17, 2007
- Speaker/Author: Advanced Estate Planning and Probate Course 2007; San Antonio, Texas, "Getting to Victory: Special Issues: Jury Charge", June 6-8, 2007
- Speaker/Moderator: Texas Guardianship Association Spring Conference, Waco, Texas, Ethics Panel; April 12-13, 2007

Advisor: National Academy of Elder Law Attorney, Inc. – Trust special Interest Group Steering Committee, 2006 to present

Speaker: State Bar of Texas - Advanced Elder Law & Guardianship Course, Houston, Texas, "Contested Guardianships", March 8-9, 2007

Speaker/Co-Author: DELAA, Houston, Texas, "Fiduciary Litigation", January 22, 2007

Speaker/Author: HBA All Day Ethics Program; Houston, Texas, "Ethical Jeopardy", November 4, 2006

Speaker: South Texas College of Law Wills and Probate Institute, Houston, Texas, "Navigating the Quagmire of Potential Claims Against Estate Planning, Trust, Probate and Guardianship Practice", September 2006

Speaker/Moderator: Advanced Estate Planning and Probate Course, Houston, Texas, "Expert Qualification and Disqualification in Probate and Fiduciary Litigation", June 2006

Speaker/Author: Planned Giving Council of Houston – Monthly Program, Houston, Texas, "Giving Till it Hurts You", May 18, 2006

Speaker/Author: Texas Trial Lawyers Association – Advanced Personal Injury Seminar, Houston, Texas "Personal Injury Involving Probate From Beginning to end or Avoiding the Silver Bullets That Can Kill Your Case", May 11-12, 2006

Speak/Co-Author: State Bar of Texas – Advanced Guardianship Course, Dallas, Texas, "Promoting the Well-Being of the Proposed Ward", March 9, 2006

Speaker: Houston Bar Association – Guardianship Certification Course For Ad Litem Appointments 2006, Houston, Texas, "The Role of the Attorney Ad Litem in a Contested Guardianship Proceeding", January 27, 2006

Speaker/Author Jefferson County Bar Association CLE – Avoiding Malpractice, Beaumont, Texas, "Avoiding The Silver Bullets That Can Kill Your Case", October 28, 2005

Speaker/Author: Tarrant County Probate Bar Association – Litigation Seminar, Ft. Worth, Texas, "Personal Injury Involving Probate From Beginning to End or Silver Bullets That Can Kill Your Case", October 14, 2005

Speaker: South Texas College of Law – Wills and Probate Institute, Houston, Texas, "Investment Plans and Guardianships", September 16, 2005

Speaker/Author: State Bar of Texas – Avoiding Malpractice, Houston, Texas, "Personal Injury Involving Probate From Beginning to End or Silver Bullets That Can Kill Your Case", August 24, 2005

- Speaker/Author:** State Bar of Texas – Avoiding Malpractice, San Antonio, Texas, “Personal Injury Involving Probate From Beginning to End or Silver Bullets That Can Kill Your Case”, August 2, 2005
- Speaker/Author:** State Bar of Texas – Avoiding Malpractice, Dallas, Texas, “Personal Injury Involving Probate From Beginning to End or Silver Bullets That Can Kill Your Case”, July 12, 2005
- Speaker/Author:** El Paso Planned Giving Counsel, University of Texas at El Paso, El Paso, Texas, “Giving Till it Hurts you”; May 23, 2005
- Speaker:** National Business Institute, Houston, Texas, “The Probate Process from Start to Finish”, May 17, 2005
- Speaker:** H.B.A. Speech to the Elderly, Houston, Texas, “Guardianship Alternatives and Settling Contested Guardianships”; May 17, 2005
- Advisor:** University of Houston Wills and Probate Advisory Committee – 1995 to present
- Speaker:** Case Law Update, Reliant Decision; Houston, Texas; The Disability and Elder Law Attorneys Association; March 21, 2005
- Speaker/Author:** TBA Trust Financial Services Division, Court Created Trusts Seminar, Dallas, Texas; “Court-Created 867 Trusts Practical Approach; March 5, 2005
- Speaker/Author:** Houston Estate and Financial Forum; Houston, Texas, “Will Your Notes Nail You? (Notes, Video, Audio, Emails, Comments and Other Faux Paus That Cause Problems)”, November 18, 2004
- Speaker/Author:** Texas Bankers Association Personal Trust Seminar; Dallas, Texas, “Dealing with the Difficult Client and/or Beneficiary”, October 7, 2004
- Speaker/Author:** Tarrant County Probate Bar Association 3rd Annual Probate Litigation Seminar; Fort Worth, Texas, “Jury Charges In Probate”, September 17, 2004
- Speaker/Author:** Texas State Bar, Charitable Giving Course; San Antonio, Texas, “Giving Till it Hurts You”, July 29-30, 2004
- Speaker/Author:** Advanced Estate Planning and Probate Course; San Antonio, Texas; “How Your Notes Can Get You Into Trouble”; June 9-11, 2004
- Speaker/Co-Author:** Wills and Probate Institute, University of Houston Law Foundation, Houston; “Dependent Administrations”; May 20-21, 2004
- Speaker:** El Paso Probate Bar Association, Texas College of Probate Judges; “Independent Administration”; May 12-13, 2004
- Speaker/Co-Author:** El Paso Probate Bar Association, Texas College of Probate Judges; “Probate Surcharge and Preliminary Proceedings”; May 12-13, 2004

Speaker/Author: Fiduciary Litigation 2004, Texas Bar CLE, Houston, May 6-7, 2004
 Speaker: Klein Forest High School "Anniversary of *Brown v. Board of Education*", May 2004
 Speaker/Co-Author: State Bar of Texas – 14th Annual Advanced Drafting Estate Planning and Probate Course; Dallas, Texas; "Will Your Notes Nail You? (Notes, Video, Audio, Emails, Comments and Other Faux Paus)"; October 23-24, 2003
 Speaker: Tarrant County Probate Bar Association Second Annual Probate Litigation Seminar; "Avoiding Sudden Death or at Least Temporary Incapacitation of your Case in Probate Court – Including Jurisdiction and Probate"; October 3, 2003
 Speaker: Advanced Personal Injury Law Course, San Antonio; "Probate Issues in a Personal Injury Case"; August 2003;
 Speaker: Advanced Personal Injury Law Course, Houston; "Probate Issues in a Personal Injury Case"; July 2003
 Speaker: Advanced Personal Injury Law Course, Dallas; "Probate Issues in a Personal Injury Case"; June 2003
 Manual Committee: State Bar of Texas - Texas Guardianship Manual, Second Edition; May 2003
 Speaker: South Texas Collage of Law "Guardianship Certification Course for Ad Litem Appointments in Probate Court"; January 2003
 Speaker: Victoria Area Estate Planning Counsel; Court Created Section 867 Trusts; November 2002
 Speaker: State Bar of Texas Advanced Estate Planning and Probate Course; June 2002
 Advisory Committee: Wills & Probate Institute, University of Houston Law Foundation; May 2002
 Speaker: South Texas College of Law "Representing the Elderly Client"; May 2002
 Speaker: San Antonio Young Lawyers Association "Docket Call in Probate Courts Seminar"; April 2002
 Speaker: Judge Rory Olsen's Class on Chemical Dependency, "The Role of The Ad Litem"; October 2001
 Speaker: University of Houston Law Center, Wills and Probate Institute Course; July 2001
 Course Director: State Bar of Texas Advanced Estate Planning and Probate Course; June 2001
 Author: Texas Collection Manual - Third Edition: Probate and Guardianship Section; March 2001

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- Guest Lecturer: South Texas College of Law - Estate Planning & Probate - Creditor Claims; March 2001
- Speaker/Facilitator: Houston Bar Association - Family/Probate Bench Bar Conference; October 27 & 28, 2000.
- Speaker/Author: Texas College of Probate Judges. Topic: Show Cause, Contempt, Surcharge, and Injunctive Actions; August 2000.
- Speaker/Author: Tarrant County Bar Association – Probate Section. Topic: Anatomy of a Will; July 2000.
- Speaker/Author: State Bar of Texas – Advanced Estate Planning and Probate. Topic: Ten Unanswered Questions in Probate; June 2000.
- Speaker: KSEV Radio Talk Show; Topic: Legal Speaking; one hour talk on trusts; March 26, 2000.
- Speaker: Disability and Elders Law Attorneys Association; Topic: Show Cause, Contempt, Surcharge, and Injunctive Actions; February 21, 2000.
- Speaker: San Antonio Young Lawyers Association; Docket Call 2000; Topic: How to Initiate a Guardianship; January 6-7, 2000.
- Speaker: South Texas College of Law; Wills & Probate Institute; Topic: Anatomy of a Will; September 16-17, 1999.
- Speaker: Texas College of Probate Judges, Annual Conference; Topic: Show Cause, Contempt, Surcharge and Injunctive Actions; September 9-11, 1999.
- Speaker: The University of Texas School of Law; Intermediate Estate Planning, Guardianship and Elder Law; Topic: Duties and Responsibilities of Ad Litem; August 26-27, 1999.
- Speaker: University of Houston Law Foundation, Wills and Probate Institute; Topic: The Anatomy of a Will; Practical Considerations in Will Drafting; Dallas - July, 22-23, 1999; Houston -July 29-30, 1999.
- Speaker: Texas Bar Association; Telephone Conference Seminar; Topic Probate and Guardianship Issues Under The New Discovery Rules; March 17, 1999.
- Speaker: Disability and Elders Law Attorneys Association; Topic: Probate and Guardianship Issues Under The New Discovery Rules; February 15, 1999.
- Speaker: South Texas College of Law; Topic: Probate and Guardianship Issues Under The New Discovery Rules; February 12, 1999.
- Speaker: Trust Financial Services Division/Texas Bankers Association; Topic: Dealing With The Difficult Client; Dallas; January 14, 1999.

- Speaker/Co-Author:** Putative Spouses and Their Role in the Probate Process.
- Speaker:** Houston Bar Association/Family Law Section; Topic: Family Law Cases Do Not Exist in a Vacuum; Probate Issues with Family Law Cases; August 1998.
- Speaker/Author:** Guardianship Institute 1998; Topic: Advanced Directives, Powers of Attorney and Disclaimers; Dallas; February 13, 1998.
- Speaker/Author:** Docket Call in Probate Court - Estate Planning, Probate, and Guardianship Seminar; Topic: Dealing With The Difficult Client; San Antonio; January 22-23, 1998.
- Speaker/Author:** State Bar - Legal Assistants Division - Advanced Estate Planning and Probate Law Seminar; Topic: Advanced Directives, Powers of Attorney and Disclaimers; October 17-18, 1997.
- Speaker:** Midland County Probate Bar Luncheon: Topic: Guardianship laws: The Basics, October 14, 1997.
- Speaker/Author:** State Bar of Texas First Annual Texas Marital Property Institute. Topic: Damages, Including Attorney's Fees; October 9-10, 1997.
- Speaker:** Tarrant County Probate Bar Luncheon: Topic: Attorney Ad Litem: How Far Do You Go? Guardian Ad Litem: Best Interest, Etc.; August 7, 1997.
- Speaker/Author:** State Bar of Texas - Advanced Strategies. Topic: Avoid Will Contests and Other Fiduciary Litigation; San Diego; April 1997.
- Speaker/Author:** State Bar of Texas - Advanced Estate Planning and Probate. Topic: Damages; June 1996.
- Speaker:** State Bar of Texas. Topic: Contesting a Guardianship and Other Important Issues; December 1, 1995.
- Speaker:** Wills and Probate Institute - South Texas College of Law. Topic: Avoiding Will Contests; September 28-29, 1995.
- Speaker/Author:** State Bar of Texas. Topic: Effect of Guardianships and Criminal Proceedings on Mental Health Hearings; March 1995.
- Speaker/Author:** State Bar of Texas Annual Meeting, Red Flags and Hot Topics, Selected Issues in Texas Law. Topic: Guardianship and Ad Litem - Changes that May Affect You; June 1994.
- Speaker:** National Association of Estate Planning Councils 1994 Annual Convention. Topic: Fiduciary Liability from the Perspective of a Probate Trial Attorney.
- Speaker/Co-Author:** University of Houston, General Practice Institute - Winter Topic: Alternatives to Probate; 1994.

- Speaker/Co-Author:** University of Houston, General Practice Institute – Summer Topic: Law Office Management for General Practitioners; 1994.
- Speaker/Co-Author:** South Texas College of Law, Wills and Probate Institute. Topic: Structuring Family Settlement Agreements to Avoid Will contests; 1994.
- Speaker:** State Bar of Texas 18th Annual Advanced Estate Planning and Probate Course. Topic: Reformation and Construction Suits; June 1994.
- Speaker/Author:** Texas College of Probate Judges Probate Seminar. Topic: Accounting, June 1994; Duties of the Attorney Ad Litem Under the Amendments to the Texas Probate Code Affecting Guardianships and Removal and Surcharge, April 1994.
- Speaker/Author:** Legislative Changes that Affect Probate Practitioners, Law Seminars, Inc.
- Speaker:** Guardianship Administration and Alternatives - Texas Elder Law Seminar.
- Speaker:** Tips from the Experts - Independent and Dependent Estates.
- Speaker:** State Bar of Texas: Elder Law Institute. Topic: An Overview of Guardianships; 1994.
- Speaker/Co-Author:** State Bar of Texas: New Guardianship Laws in Texas. Topic: Show Cause, Contempt, Surcharge and Successor Actions; March 1994.
- Speaker:** Texas Association of Legal Secretaries: Mock Trial; 1994.
- Speaker/Author:** A.G. Edwards, Structured Settlement vs. 142 Trusts.
- Speaker/Co-Author:** New Guardianship Forms.
- Speaker/Co-Author:** State Bar of Texas: Advanced Estate Planning and Probate Course. Topic: Procedural and Evidentiary Overview for the Probate Litigator; 1993.
- Speaker:** University of Houston: General Practice. Topic: “Money Saving Tips for Tomorrow Morning”; 1993, 1994.
- Speaker:** American Association for the Mentally Ill - 1993.
- Speaker:** Advanced Estate Planning and Probate - 1993, State Bar of Texas.
- Speaker/Author:** National College of Probate Judges, March 1993, Maui, Hawaii - The Ramification of Closed Head Injury.
- Speaker:** Appeals, Mandamus & Recusal, Legislative Update, Advanced Directives.
- Speaker/Co-Author:** State Bar of Texas; Wills and Probate Institute. Topic: Appeals, Mandamus and Recusal; 1992.

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- Speaker:** University of Houston-Downtown – Guest Lecturer - Business Law, 1992;
University of Houston-Clear Lake – Guest Lecturer - Advanced Directives.
- Speaker/Author:** Texas College of Probate Judges (1991-94) - Head Injury.
- Speaker:** Texas Young Lawyers Association, The Women’s Advocacy Project and Texas
Lawyers Care.
- Speaker:** Estate Planning for the Cancer Patient.

COPY

UNOFFICIAL

LORI A. WALSH
CRAIN, CATON & JAMES
A PROFESSIONAL CORPORATION
1401 McKinney, 17th Floor
Houston, Texas 77010-4035
lwalsh@craincaton.com

EDUCATION

Doctor of Jurisprudence: South Texas College of Law, Houston, Texas
Bachelor of Arts: Sam Houston State University, Huntsville, Texas

EXPERIENCE

November 2012 - Present: Associate Attorney with Crain, Caton & James, P.C., representing fiduciaries and beneficiaries in trial courts in the State of Texas in matters relating to probate and trust administration issues, including, but not limited to, will contests; will and trust interpretation issues; creditors' claims; surcharge actions; accounting and administration issues; prosecution and defense of various fiduciary claims; representing applicants and contestants in guardianship proceedings; representing personal representatives, trustees, beneficiaries, and guardians in matters relating to the administration of estates, trusts, and guardianships; drafting of wills, trusts, and ancillary documents.

CERTIFICATIONS

Certified by the State Bar of Texas to serve as an Ad Litem in guardianship and heirship proceedings.

ASSOCIATIONS AND AFFILIATIONS

State Bar of Texas (Real Estate, Probate and Trust Section); American Bar Association (Real Property, Probate and Trust Law Section); Houston Bar Association (Probate, Trust and Estate Section); Houston Young Lawyers Association; Disability and Elder Law Association, member; Mothers Against Drunk Driving, member; Woodlands Church, member.

