

EAST TEXAS ESTATE PLANNING COUNCIL

COUNCIL MEETING: Wednesday, March 20, 2019

WHERE: Hollytree Country Club

TIME: Register and Lunch: 11:30 AM – 12:00 PM
Program: 12:00 PM – 1:00 PM

SPEAKER: Henry Charles “Chuck” Bauman, III, CELA

TOPIC: “Supplemental Needs Trusts”



Chuck Bauman received his Juris Doctor from Baylor University in 1992. As the first Certified Elder Law Attorney in East Texas, he focuses his practice on estate and asset preservation planning for clients through the use of trusts, wills, partnerships, limited liability companies, corporations, tax planning and other planning techniques. Mr. Bauman also has expertise in planning for families with children who have disabilities or other special needs. As an elder law attorney, he can give particular focus to client’s end of life planning through the use of custom drafted advance directives (including Medical Powers of Attorney and Directives to Physicians or Living Wills).

Mr. Bauman is a member of the State Bar of Texas, Smith County Bar Association, East Texas Estate Planning Council (Past Board Member), and the National Academy of Elder Law Attorneys (Texas Chapter, NAELA- Past President). Mr. Bauman is admitted to practice before the U. S. District Court in the Eastern District of Texas and in all Texas state courts. Certified as an Elder Law Attorney by the National Elder Law Foundation as recognized by the Texas Board of Legal Specialization, Mr. Bauman assists clients in properly planning for long-term care costs, and preserving their assets from the threats of estate, gift and generation-skipping transfer taxes, tax planning, nursing home rights, probate and estate administration, advance directives, guardianships, and will and trust planning.

Mr. Bauman is an active leader in several community and civic organizations: Past President of Smith County Young Lawyers, Phi Delta Phi Fraternity, and Past President of the Tyler Rotary Club. Currently, Mr. Bauman is serving as a deacon at Green Acres Baptist Church in Tyler and works as a volunteer in the youth ministry there.

C. E. CREDIT: No prerequisites required.

CPAs: One hour
Attorneys: One hour

CFP: One hour
CLU: One hour - based on course content

Please RSVP no later than Friday, March 15, 2019.

Cancellations must be made prior to 12:00 noon on Tuesday March 19, 2019.

Please be prepared to pay for your meal at the time of meeting.

Member(s) Attending: _____

If bringing Guests, how many? _____

Please provide the names of your guests: _____

Buffet Style Lunch – Cost \$20.00 (Due at time of meeting)

MAIL, PHONE, FAX, OR E-MAIL YOUR REPLY TO:

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