



MASTER CALENDAR

(At the end of each Council meeting, the Chair should review all items that will take place prior to the next Council meeting.)

June 1st

Fiscal Year Begins

State Bar's and REPTL's fiscal years begin.

Early June
(Even Years Only)

Finalize and Forward Bar Package for Section and Committee Review

Substantive committee chairs in the Probate and Trust Law Division should provide the Bar package to chair of the Estate and Trust Law Legislative Affairs Committee, who in turn will forward the packages to the Manager of the Bar's Sections Department (currently Tracy Nuckols – Tracy.Nuckols@TEXASBAR.COM) for submission to other sections and committees for comment.

Early to Mid-June

Advanced Estate Planning and Probate Course

The Chair (or Chair-Elect) presents the Distinguished Probate Lawyer Lifetime Achievement Award at the seminar. (See the Advanced Real Estate Law Course in July regarding updating the Section's website to reflect the new recipient of this award.)

Early to Mid-June
(Even Years Only)

Annual Section Meeting

In even-numbered years, the Chair presides over the Section's Annual Meeting during the Advanced Estate Planning and Probate Course, at which the new Officers and Council Members are elected. At the conclusion of the Section's Annual Meeting, the terms of the prior Officers and Council Members end, and the terms of the new Officers and Council Members begin.

End of June
(Even Years Only)

Officially Submit Bar Package

Legislative packages must be submitted to the Bar (July 2st in 2018).

July 15th

Deadline for Submission of Financial Report to Bar

After adoption of the budget at the Spring Council Meeting, the Treasurer should forward a complete financial report for the preceding fiscal year, including a balance sheet and income statement (see Bylaws, Article VIII, Section 3). We also include the new budget. [This information is actually submitted to the Bar's Section's Accountant, currently Sandra Carlson – sandra.carlson@texasbar.com].

Early to Mid-July

Advanced Real Estate Law Course

The Chair (or Chair-Elect) presents the Distinguished Real Estate Lawyer Lifetime Achievement Award at the seminar. The Manager of the Bar's Sections Department then updates the Section's website to reflect the new recipient of this award and the Probate Lawyer award presented at the Advanced Estate Planning and Probate Course in June.

**Early to Mid-July
(Odd Years Only)**

Annual Section Meeting

In odd-numbered years, the Chair presides over the Section's Annual Meeting during the Advanced Real Estate Law Course, at which the new Officers and Council Members are elected. At the conclusion of the Section's Annual Meeting, the terms of the prior Officers and Council Members end, and the terms of the new Officers and Council Members begin.

Late July or Early August

State Bar's New Chairs and Treasurers Orientation

Usually in Austin.

Mid-Summer

Review Committees and Conduct Officers' Planning Session

The Chair and Chair/Elect should determine whether any changes are necessary or advisable with respect to the chairs of each committee. Changes should be forwarded to the Manager of the Bar's Sections Department for inclusion on the Section's website.

The officers should conduct a planning session with the assistance of the Manager of the Bar's Sections Department.

**Summer
(Even Years Only)**

Work on Probate Bill Analyses

Substantive committee chairs in the Probate and Trust Law Division should be working on bill analyses.

**Mid-August
(Even Years Only)**

SBOT Legislative Policy Subcommittee Meeting

Substantive committee chairs in the Probate and Trust Law Division present REPTL's legislative package to the Bar Board's Legislative Policy Subcommittee

**Mid-August
(Odd Years Only)**

Initial Probate Committee Meetings

Substantive committees in the Probate and Trust Law Division should hold a meeting (usually by telephone) to consider initial proposals for following legislative session.

Late-Summer

Committee Membership; Solicit Grant Program Applications

The chair of each committee should determine whether any changes are necessary or advisable with respect to the committee membership. Changes should be forwarded to the Manager of the Bar's Sections Department for inclusion on the Section's website.

In addition, the Treasurer, as chair of the Public Service Committee, should determine whether any changes are necessary or advisable with respect to the Grant Program criteria and application. The Treasurer should coordinate with the Manager of the Bar's Sections Department to e-mail solicitations for grant applications to appropriate sources, including an eBlast to the Section membership.

Mid-September
(Even Years Only)

SBOT Board Approval of Legislative Package

The Bar's Board of Directors officially approves our legislative package.

A Week Before the Fall
Council Meeting
(Odd Years Only)

Initial Legislative Proposals

Substantive committee chairs circulate their legislative proposals to the Council by submitting them for posting on the Upcoming Meeting page of the website.

Late September or
Early October

REPTL Council Fall Meeting

The previous officers should conduct an orientation session for the new Treasurer and Council members immediately prior to the Fall Meeting.

Late September or
Early October
(Odd Years Only)

REPTL Council Fall Meeting

In odd-numbered years, the full Probate and Trust Law Division should review and make initial decisions regarding legislative proposals.

Right After the Fall
Council Meeting
(Odd Years Only)

Draft Language for Approved Legislative Proposals

Substantive committees in the Probate and Trust Law Division should begin working on actual legislative language for each proposal approved by the full Probate and Trust Law Division.

October
(Even Years Only)

Forward Approved Legislative Package to Lobbyist

The chair of the Estate and Trust Law Legislative Affairs Committee should provide legislative proposals to the Section's lobbyist (currently Clint Hackney – cphackney@yahoo.com)

November
(Even Years Only)

Prefiled Bills

Bills can be prefiled as soon as the Monday following the November general election.

Early December

Reserve Slots for Presentation of Lifetime Achievement Awards

Coordinators for the respective Distinguished Real Estate or Probate Lawyer Lifetime Achievement Awards should contact the TexasBarCLE Program Director or Coordinator for the appropriate Advanced Course to make sure that a time slot is allotted for presentation of the award.

Early December
(Even Years)

Reserve Slot for Annual Meeting

The REPTL Chair should assure that there is time allotted for the Section's **Annual Meeting at the Advanced Real Estate Law Course**. The Chair-Elect should determine if time should be allotted at the Advanced Estate Planning and Probate Course for a "REPTL Presentation."

**Early December
(Odd Years)**

Reserve Slot for Annual Meeting

The REPTL Chair should assure that there is time allotted for the Section's **Annual Meeting at the Advanced Estate Planning and Probate Course**. The Chair-Elect should determine if time should be allotted at the Advanced Real Estate Law Course for a "REPTL Presentation."

December ___

Writing Competition Deadline

Deadline for submitting entries for the Student Writing Competition

**Mid-January
(Even Years Only)**

Legislative Timetable for Next Year's Session

The Bar's Board of Directors adopts the Legislative Package Preparation Timetable for the following year's legislative session.

**Mid-January
(Odd Years Only)**

Legislative Session Begins

The session begins. Our bills are filed. The fun begins.

January ___

Selection of Writing Competition Winners

Student Writing Competition judges select winners for each division

January ___

Grant Program Application Deadline

Deadline for submitting applications for the REPTL Grant Program

**A Week Before the
Winter Council Meeting
(Even Years Only)**

Circulate Drafts of Legislative Proposals

Substantive committee chairs circulate drafts of proposed language for their legislative proposals to the Council by submitting them for posting on the Upcoming Meeting page of the website.

**Late January or Early
February**

REPTL Council Winter Meeting

The Nominating Committee (the three most recent Past Chairs) reports their nominations for the offices of Chair-Elect/Secretary, Treasurer, and four Council Members (two from each Division). Resumes should be circulated among the Council.

The Treasurer submits an initial proposed budget for the succeeding fiscal year.

**Late January or Early
February
(Even Years Only)**

REPTL Council Winter Meeting

In even-numbered years, the full Probate and Trust Law Division should review and provide feedback on the current language of legislative proposals.

**Right After the Winter
Council Meeting**

**Solicit Nominations for Lifetime Achievement Awards; Notify Section of
Officer and Council Nominations**

The Chair should solicit nominations for the Distinguished Lifetime Achievement Awards by eBlast to the entire section. The Chair may also include in that eBlast the names of the new Treasurer and Council member nominees, and the date, time, and place of the Section's Annual Meeting.

Add Officer and Council Nominees to E-Mail Lists, Website, and Roster

Contact information for the officer and Council Member nominees should be forwarded to the Manager of the Bar's Sections Department (and the Keeper of the Roster) for current inclusion on the Council's e-mail lists and later inclusion (after the Annual Meeting) on the Section's website and Roster. The Manager should also contact FirstStep to provide the nominees access to the Council Work Area. The Chair (or Chair-Elect) should inform the nominees that they'll be receiving these e-mails and granted access for their information only, since their terms have not yet begun.

Order Plaques or Gifts

The Chair should order plaques or other gifts for the outgoing Council members for presentation to them at the Spring Meeting. These are ordered through the Sections Department of the State Bar.

The Chair-Elect/Secretary should order a plaque or other gift for the outgoing Chair for presentation to him/her at the Section's Annual Meeting. (Note: This is not as time-critical since it will be presented several months after the Spring Meeting.)

**Right After the Winter
Council Meeting
(Even Years Only)**

Revise Drafts of Legislative Proposals

Substantive committees in the Probate and Trust Law Division should revise legislative language based on feedback from full Probate and Trust Law Division.

April 1st

**Deadline for Submitting Nominations for Distinguished Lifetime
Achievement Awards**

Nominations should be submitted to the respective chairs of the Division committees – currently Phil Weller for the Real Estate Law Division and Nikki DeShazo for the Probate and Trust Law Division.

The coordinators for those committees should order a plaque or other gift for their respective award recipients as soon as their identities are determined, for presentation and the respective Advanced Courses.

Confirm that awards have been ordered through Visible Applause (Tom Ferguson; tom@visibleapplause.com)

**A Week Before the
Spring Council Meeting
(Even Years Only)**

Circulate Revised Drafts of Legislative Proposals

Substantive committee chairs circulate drafts of [hopefully final] language for their legislative proposals to the Council by submitting them for posting on the Upcoming Meeting page of the website.

Late April or Early May

REPTL Council Spring Meeting

The Real Estate Division Chair or Chair-Elect and the two most recent Past Chairs report their selection for the Distinguished Real Estate Lawyer Lifetime Achievement Award. The three most recent Probate Division Past Chairs report their selection for the Distinguished Probate Lawyer Lifetime Achievement Award. The respective chairs of each Division's Lifetime Achievement Award committee should gather biographical information for the nominees to be forwarded to the Manager of the Bar's Sections Department for later inclusion (after each respective award presentation) on the Section's website.

The Public Service Committee reports its recommendations for the Grant Program.

The Council adopts a final budget for the succeeding fiscal year.

**Late April or Early May
(Even Years Only)**

REPTL Council Spring Meeting

In even-numbered years, the full Probate and Trust Law Division should review and approve what is [hopefully] final language of legislative proposals.

**Right After the Spring
Council Meeting**

Obtain and Forward Bios for Lifetime Achievement Award Recipients

The respective chairs of each Division's Lifetime Achievement Award committee should gather and forward biographical information for each of the recipients to the Manager of the Bar's Sections Department for later inclusion (after each respective award presentation) on the Section's website.

**Right After the Spring
Council Meeting
(Even Years Only)**

Finalize Legislative Proposals

Substantive committees in the Probate and Trust Law Division should put finishing touches on legislative language and put legislative package in form to submit to Bar's Board of Directors.

Early May

Send Annual Meeting Notice to REPTL Membership

Notice of the time and place of the Annual Meeting and of the nominees (officers and council positions) reported at the Winter Meeting must be published in the Reporter or distributed to the Section membership **thirty days prior to** the Annual Meeting (Bylaws, Article V, Section 2). Notice may be distributed by e-mail (Bylaws, Article XI).

May 31st

Fiscal Year Ends – State Bar's and REPTL's fiscal years end.

June 1st

Fiscal Year Begins – Return to the beginning of this calendar!

(Last revised 7/22/17)