



# 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 1<sup>st</sup>

## 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](mailto: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 2<sup>st</sup> in 2018).*

July 15<sup>th</sup>

## 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](mailto: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](mailto: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 1<sup>st</sup>**

**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](mailto: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 31<sup>st</sup>**

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

**June 1<sup>st</sup>**

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

(Last revised 7/22/17)



Master Calendar 082020 version

	1-Jun	SBOT fiscal year begins	
	25-Jun	Lit Section General membership meeting to elect new officers	2019-2020 Chair
June 25-26, 2020		SBOT Annual Meeting	
	29-Jun	Deadline to submit legislative proposals for inclusion in the 2021 State Bar Legislative Program	Legislative
July		Notice of the Legislative Policy Subcommittee Meeting published in the Texas Bar Journal	Legislative
July 1 (even years only)		Legislative package to be submitted to State Bar	Legislative
	10-Jul	Send new Council and Officer roster to SBOT Sections Department	Chair
	12-Jul	Provide names of Litigation Update Committee and Planning Committee to TexasBarCLE	Chair and Litigation Update
Mid-July	15-Jul	Litigation Section Budget due to SBOT Executive Director	Chair and Treasurer
		Advocate Summer Issue electronically published	Advocate
	21-Jul	Litigation Update planning meeting with TexasBarCLE	Litigation Update
	30-Jul	Executive Director prepares and forwards to each member of the Legislative Policy Subcommittee proposed legislation	Legislative
	31-Jul	Chair Report due to Advocate	Chair
	3-Aug	Deadline for objections on legislative proposals to be submitted in writing to the State Bar	Legislative
August 13-14, 2020	10-Aug	SBOT Orientation for Chair, Chair-Elect and Treasurer	Chair, Chair-Elect and treasurer
		Tentative public hearing on legislative proposals	Legislative
	14-Aug	New Council Member Orientation	Immediate Past Chair
	24-Aug	Tentative appeal deadline on legislative proposals not recommended for inclusion	Legislative
	28-Aug	Tentative second meeting of the Legislative Policy Subcommittee	Legislative
	31-Aug	News for the Bar published	News for the Bar
	31-Aug	Section membership dues finalized	Treasurer
	3-Sep	Implicit Bias Taping of Dr. Destiny Peery at 1:30	
	8-Sep	Tentative deadline for appeal from decision made at second Legislative Policy Subcommittee meeting	Legislative
	11-Sep	Report of Legislative Policy Subcommittee sent to the Board of Directors	Legislative
	18-Sep-20	Council Meeting - Virtual ZOOM 9:30-4	Chair
September 24-25, 2020		State Bar Board of Directors Meeting	
Mid-October		Advocate Fall Issue mailed to members	Advocate
	23-Oct	Chair Report due to Advocate	Chair
	23-Oct	Council of Chair meeting, Texas Law Center, Austin	Chair
	23-Oct	Solicit Nominations for Luke Soules Award	Luke Soules Committee
	23-Oct	Send Grant Applications to non-profits and News for the Bar	Grants
	9-Nov	Pre-filing of bills for the 87th Legislative Session begins	Legislative
	2-Nov	Annual Meeting deadline to submit date and time preference for CLE program	Annual Meeting
	2-Nov	Recommend names for Annual Meeting Luncheon Speaker to SBOT	Annual Meeting
	13-Nov	Deadline for sections supporting legislative proposals to submit to the Executive Director a list of legislative sponsors for each proposal	Legislative
	15-Nov	Deadline for Luke Soules Award recipient to be chosen	Luke Soules Committee
	15-Nov	Deadline for recipients of Lit Update scholarships to be chosen	Grants
	30-Nov	Section membership dues finalized	Treasurer
Early January 2021	1-Dec	Send 1/4 page Bar Journal Ad (free) to Bar Journal	Membership
		Advocate Winter Issue mailed to members	Advocate
	4-Jan	Annual Meeting deadline to submit programming for brochure (topics and speakers)	Annual Meeting
January 21-22, 2021		Litigation Update (virtual)	Litigation Update
January 21-22, 2021		SBOT Board of Directors Meeting	
January 22-23, 2021		Council Meeting (San Antonio)	Chair
January 22, 2021		Council approval of Internship recipients	Grants
January 22, 2021		Chair Report due to Advocate	Chair
January 2021 or Annual Meeting		Present Luke Soules award	Luke Soules Committee
	12-Jan	87th Legislative Session begins	Legislative
January 21-22, 2021		State Bar Board of Directors Meeting	
	1-Feb	Registration and hotel reservations for Annual Meeting	
	5-Feb	Send blast email to membership inviting self nominations or nominations to Council	Nominations
	12-Feb	Grant Application Deadline	Grants
	22-Feb	Order awards, council and chair plaques, food & beverage, AV for Annual Meeting	Chair, Chair-Elect and Annual Meeting
	26-Feb	Grant Applications forwarded to Grants Committee members	Grants
	26-Feb	Council of Chair meeting, Texas Law Center, Austin	Chair
	28-Feb	News for the Bar published	News for the Bar
	12-Mar	Deadline to submit nominations to Council	Nominations
Early April 2021	26-Mar	Nominations Committee submits proposed slate to Executive Committee	Nominations
		Advocate Spring Issue mailed to members	Advocate
	1-Apr	Deadline for section year end report to Texas Bar Journal	Chair
	5-Apr	Annual Meeting deadline for cle articles, ppts, speaker bios and photos	Annual Meeting
April 8-10, 2021		Council Meeting Camp Lucy (address next year budget, Grants, and Nominations)	Chair
April 15-16, 2021		State Bar Board of Directors Meeting	
	16-Apr	Send email blast to membership reminder of renewing Section membership	Membership
	10-May	New Lawyer Induction	Membership
	21-May	Deadline to book hotel for Annual Meeting	ALL
	21-May	Executive Committee and Nominations Committee finalizes new Council Members and Officer listing	Executive Committee and Nominations
	21-May	Chair Report due to Advocate	Chair
	30-May	News for the Bar published	
	31-May	87th Legislative Session ends	Legislative
	1-Jun	SBOT fiscal year begins	
June 17-18, 2021		Annual Meeting - Omni Hotel Ft. Worth, TX	