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Congratulations to Tresi and all of her fellow graduates in the

Class of 2016 Leadership Plano!

Tresi is a proud member of class 33. We are so excited about what this fine organization is doing as they invest in building up great leaders for our community!

UPCOMING EVENTS

- July 9th from 9:00am to 11:00am Tresi will speak at the **Warren Center** in Richardson on Special Needs Planning. She will be joined by financial planner Matt Adamczyk.
- **The City of Plano Parks and Recreation Department's** final opportunity to hear Tresi speak this summer is right around the corner! Learn more about Special Needs Planning Tuesday, July 12th, 7:00PM to 8:00PM *The cost of each course is \$9 for residents of the City of Plano and \$13 for non-residents. Space is limited, so [register today](#). Hope to see you there!
- **Free Family Legal Documents 101 workshop:** If you missed last month's workshop, you have three additional opportunities July 14th, September 7th and October 21st to attend this free workshop to learn what legal documents you need to protect your family. You must register to attend as seating is limited. Click [here](#) to register today
- July 21st Tresi will speak to the **Dallas Enforcement Officers**
- August 11-12 Tresi will attend the **18th Annual Estate Planning, Guardianship and Elder Law Conference** in Galveston.
- August 13-14 Tresi will attend the **Texas NAELA Summer Conference**. Tresi is a member of the host group, the Texas Chapter of the National Academy of Elder Law Attorneys (NAELA).

Important Texas Legislative Update: Rate Reductions for Pediatric Therapy



In 2015, the Texas legislature approved a two-year budget that included a \$350 million cut to Medicaid funding for pediatric therapy services. The cuts have been delayed for months, but after a failed attempt at judicial intervention by therapy providers, **the cuts will take effect in just a few weeks in the form of rate reductions for therapy services.** The services at issue include speech therapy, occupational therapy and physical therapy – and these are vital to many families. [Read more](#)



Beware the Beneficiary's Burden: Many Life Insurance Companies Are Not Initiating Policy Payouts

The state of Minnesota recently went to bat for its citizens when it was revealed that insurance carriers were not paying the beneficiaries of life insurance policies where a claim had not been made. The companies' defense? You might be surprised to know that they didn't claim some kind of procedural or operational error. In fact, quite the contrary, the failure to pay was a *deliberate operational strategy*.

The companies took the position that it was the beneficiaries' responsibility to contact them. So what if the beneficiary is unaware the policy exists? As a consequence of the insurance carriers strategy, tens of millions of dollars meant for the loved ones of policy holders who had faithfully paid their premiums, were instead kept and invested for the benefit of the insurance company. Sound illegal? Apparently the actions of the insurance companies haven't been declared criminal, but I think most people would agree that what's going on is – at a minimum – unethical. [Read more](#)

RECENT HIGHLIGHTS

- June 1st, Tresi was elected to the Board of the **Dallas Chapter of the Society for Financial Service Providers (FSP)**
- June 16th, Tresi was a guest on KVGI radio show **Hunter's Autism Specials** where she spoke with host Chad Kleis about the importance of Special Needs Planning
- June 24th, Tresi was elected to the Board of the **Collin County Bar Association**



July 2016

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