

National



CONFERENCE

on Guardianship

October 20 – 23, 2018

Renaissance Palm Springs, Palm Springs, CA

An Oasis of Knowledge



Welcome to the National Guardianship Association's 2018 National Conference on Guardianship. This year's program again features outstanding presentations that will appeal to professional and family guardians, public and private guardians, and participants at every level of experience.

New this year, we've selected some breakout sessions that we think will be popular, and scheduled them to be presented twice, so that you have a little more flexibility when choosing which sessions to attend.

In addition, our general sessions feature outstanding presenters, including former San Diego Deputy District Attorney Paul Greenwood and ethics expert Viki Kind. Conference favorite Frank Acuña returns with Tracy Regli to close the conference with Ethics Jeopardy. And you'll also hear from Dakota Maynard, a young man who will discuss living with Autism.

Our conference hotel is located in downtown Palm Springs, so we encourage you to add some time at the beginning and end of the conference to explore this beautiful and exciting area of the country. As usual, we will hold a silent and live auction, host a dine-around, and offer multiple networking opportunities. This brochure contains complete information about our general and concurrent sessions, our conference intensives, hotel information, and much more. We look forward to welcoming you to our "Oasis of Knowledge" in October!





Saturday Conference Intensives

National Conference on Guardianship | October 20 – 23, 2018

**These conference intensives are not included in the conference fee.
Additional registration fees apply to attend these programs.**

7:00 am – 5:00 pm **Registration area open**

8:15 am – 11:30 am **Belts, Suspenders, and Lead-Lined Jockey Shorts: What a Professional Guardian Must Know About Mitigating Risk!**

Frank R. Acuña, Acuña Regli
Steven Barlam, MSW, LCSW, CMC, LivHOME
Scott MacDonald, Merrill Lynch Special Needs Team
Tracy S. Regli, Acuña Regli
Lisa Soloway, Soloway Fiduciaries, Inc.
Kathy L. Sorenson, Sorenson Insurance Services, LLC

You've been asked to take on a new case. What diligence review must be done before accepting the retention or appointment? What are the tasks to be completed within the first 30 days, 60 days, 90 days, and beyond? How do using checklists and "best practices" reduce potential liability down the line? And, of course, what must every professional guardian have in place to insure themselves against errors and omissions liability? This intensive will be taught by experienced advisors who have supported PFAC and its members for years. Best practices advised by each of these presenters have become industry standards. You do not want to miss this panel sharing their expertise!

8:15 am – 11:30 pm **Legal and Legislative Review, Part 1**
12:45 pm – 4:00 pm **Legal and Legislative Review, Part 2**

Steven D. Fields, JD, Tarrant County Probate Court Two
Terry W. Hammond, JD, Terry W. Hammond & Associates
Sally Hurme, JD, Sally Balch Hurme LLC
Arin Norris, JD, NMG, Lutheran Services Florida
Dari Pogach, JD, ABA Commission on Law and Aging
Ira Salzman, JD, Goldfarb Abrandt Salzman & Kutzin, LLP

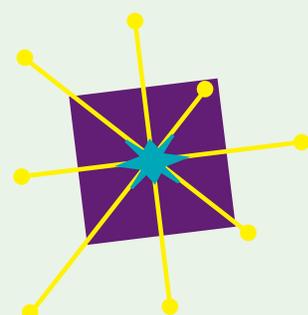
A panel of respected guardianship legal experts will summarize the major reported court decisions and legislation in the United States during the past year that concern guardianship issues relevant to both professional and family guardians and the attorneys who represent them.

12:45 pm – 4:00 pm **It's Not Just Dementia! What Every Guardian Needs to Know About Mental Health**
Steven A. Weisblatt, MD, FAPA

Dr. Weisblatt's presentation at last year's conference was so popular, that we have invited him back to share even more information. This expanded session will equip guardians with a method to help maximize the potential of their patient by identifying existing, unrecognized, medical problems, or misdiagnosed or mistreated brain chemistry imbalances.

Most often, psychiatric assessment in the elderly and disabled is simply whether or not the person is suffering from dementia or maladaptive behavior, and the "clinician" prescribes drugs to moderate "symptoms". This usually involves medicines given for complaints of poor sleep, depressed mood, agitation, irritability, etc., without sufficient attention to differentiating the potential causes for the presenting problem. Often, this process places further limitations on already-limited mental and behavioral functions and does not allow elderly and disabled patients to live to their best potential.

Whereas brain damage is generally irreversible, existing mental health symptoms – e.g. from a mental health disorder or prescribed medications, circadian rhythm dysfunction, hypothyroidism, and inappropriately prescribed psychotropics – can be reversed! To do this requires a very accurate assessment.



Conference Schedule

National Conference on Guardianship | October 20 – 23, 2018

////// Saturday, October 20

4:00 pm – 5:30 pm State Affiliates Meeting

5:30 pm – 6:30 pm Welcome Reception

////// Sunday, October 21

7:00 am – 5:30 pm Registration Area Open

7:15 am – 8:20 am Breakfast

7:15 am – 8:15 am New Member Breakfast

8:20 am – 8:30 am Welcome and Opening Remarks
Wanda Bevington, 2018 Conference Chair

8:30 am – 10:00 am **Forgotten Victims No More: Bringing Elder Abuse Out of the Shadows**
Paul R. Greenwood, Retired Deputy District Attorney, San Diego District Attorney's Office
Retired deputy district attorney Paul Greenwood will draw upon his 22 years of prosecuting felony elder abuse crimes to highlight ways that we can overcome common obstacles that often hinder successful investigation and prosecution of such crimes.

10:00 am – 10:30 am Break with Exhibitors

10:30 am – 11:45 am Concurrent Breakout Sessions

**Curative, Palliative and Hospice Care:
Fitting the Puzzle together for
Optimum Care**
Marilyn Halpern, Good Shepherd Fund

Health care is a complex array of choices and options. As adults age, the intersection of curative, palliative, and hospice care can spark complex decisions. In this session, we will explore how to guide individuals through their health care journey. End of life health care documents will also be explored. Practical and concrete tips will be offered to ensure best practices, as well as incorporating NGA's Standards of Practice and Ethical Principles into our medical care decision-making.

**Supported Decision-Making:
Alternatives to Guardianship**
**Erica C. R. Costello, JD, NCG,
Indiana Supreme Court**
**Rebecca M. Pryor, MSM, NCG,
Creative Approaches LTD**
**Melissa Keyes,
Indiana Disability Rights**
**Honorable Gregory A. Horn,
Wayne Superior Court No. 2**
**Angela Blevins, NCG,
Achieva Resources Corporation, Inc.**

This panel will provide information on existing alternatives to guardianship, with a special emphasis on the Working Interdisciplinary Networks of Guardianship Stakeholders (WINGS) project in Wayne County, Indiana, which focuses on supported decision-making as a least restrictive alternative to guardianship.

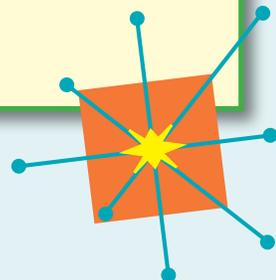
This session will be repeated at 4:40.

**Records Management for Fiduciaries
and Guardians**
**Lori Hefner, MA, MBA, CLPF,
Trustcare Fiduciary and Care
Management Services**

Judges assume that guardians and fiduciaries understand and adhere to the national laws and administrative rules regarding how long client, guardianship, and trust records must be maintained. But do you? Taught by one of only 35 certified archivists and records managers in the United States, this session focuses on how long to keep records, how to store them, and the appropriate time to destroy them.

11:45 am – 1:15 pm Lunch and Annual Meeting

1:15 pm – 1:30 pm Break with Exhibitors



National Conference on Guardianship

1:30 pm – 2:45 pm Concurrent Breakout Sessions

Are You Covered? Risk Management and Insurance for Professional Fiduciaries

Andrew R. Jones,
Furman Kornfeld & Brennan LLP
Lawrence D. Hilton,
Dominion Insurance Services, Inc.
Ashley Glazewski,
Furman Kornfeld & Brennan LLP

This presentation will discuss the importance of risk management and insurance for professional guardians. Some main points for discussion include: common claim scenarios, understanding insurance terms, knowing what to do in the event of a claim, and how to avoid claims and disputes through risk management techniques.

Deconstructing and Differentiating the Three D's:

Dementia, Delirium, and Depression
Anne C. Sansevero, RN, MA, GNP,
CCM, HealthSense LLC and
Holistic HomeCare Associates, LLC

Dementia, delirium, and depression are some of the most commonly observed behavioral disorders seen in aging populations. Yet, oftentimes, because these conditions can present in similar ways, they are confused with one another. This can result in one or more of the conditions going undetected and untreated, significantly impacting the health and well-being of the older adult. In the era of an increasingly fragmented health care milieu, it is becoming more important than ever for guardians to be able to identify key risks, signs, and symptoms associated with all three conditions so that they can advocate for appropriate support, treatment, and management to promote optimal quality of life for these vulnerable populations.

This session will be repeated at 4:40.

Volunteer Guardianship in Ohio: A Comprehensive Overview of Ohio Programs From Implementation to Current Operations

J. J. Mesko-Kimmich, M.Ed., LPC
Volunteer Guardian Program
Brenda Starr-Jude, NCG,
Mid-Ohio Guardianship Services, Inc.
Kendra Daniel, MGS, JD,
Lutheran Metropolitan Ministry

Participants will learn how several programs operate in Ohio and how to build a successful volunteer guardian program. This includes ongoing program assessment, collaboration, and development. The session will focus on implementation techniques, including marketing and recruitment, volunteer support and retention, and the importance of networking at the state and national levels.

2:45 pm – 3:00 pm Break with Exhibitors

3:00 pm – 4:15 pm Concurrent Breakout Sessions

Family Matters: How to Create a Cooperative Working Plan

Leesa Arthur, CPG, Summit Guardian Services

With client and family conflict being one of the most negatively portrayed aspects of guardianship, it's time to rethink that dynamic. We'll look at some ideas for professional and public guardians to change how they perceive and respond to client and family involvement in their guardianship case. This is not a discussion on how to manage the conflict; it's a presentation on how to actually change the guardianship structure so it actually works.

End of Life Experiences: "I Felt Like I Couldn't Do What She Wanted"

Traci Cucinotta, MBE, LICSW, Guardian Community Trust
Heather Connors, NCG, Ph.D., Guardian Community Trust

Interviews with Massachusetts guardians found frustration with end of life court procedures. Guardians reported a lack of consensus regarding whether they had authority to change a code status and dissatisfaction with delays when decisions were brought before the court. Delays often resulted in unnecessary procedures, negatively affecting patient, treatment team and guardian. Guardians suggested new legislation to clarify the guardian's authority at end of life, as well as judicial training.

Eight Questions to Ask Your Financial Advisor: Fiduciary Ethics

Darryl Lynch, AIF, Oppenheimer and Co., Inc.
Peter C. Palumbo, AIF, Oppenheimer and Co., Inc.
Kimberly Edgar, The Bar Plan Mutual Insurance Company

Eight questions to ask your financial advisor to ensure she/he is acting in the capacity of a fiduciary and is looking out for your client's best interest. Here are a few topics we will discuss:

1. How to select and monitor an investment advisor
2. How to standardize your investment decision making process
3. How to stay in compliance with your fiduciary responsibilities
4. How restricting and bonding can be a cost reduction technique

Advanced Decision-Making: Guardianship 401

Arin Norris, JD, NMG, Lutheran Services Florida
Missy Tackett, NCG,
Southern IN Adult Guardianship Services
Kathleen Houseweart, MBA, Lutheran Services Florida
Holly Lapka, LCSW, Therapist in Private Practice

For years, this panel has been presenting "Guardianship 101" to freshly appointed family guardians and interested partner agencies, to spread an understanding of the basic concepts in guardianship. Meanwhile, seasoned guardians are dog-eared their *Standards* and talking themselves through huge decisions with the most difficult of client behaviors, understanding complex medical issues, and navigating complicated relationships. This content is about how to figure out what seems like the most difficult decision you have ever faced, and then come back to do it again. Not for the faint-of-heart guardians.

This session will be repeated on Monday at 3:45.

National Conference on Guardianship

4:15 pm – 4:30 pm Break with Exhibitors

4:30 pm – 5:30 pm Concurrent Breakout Sessions

Innovative Collaboration Resulting in Desired Outcomes: Working with Aging Life Care Professionals Steven Barlam, MSW, CCSW, CMC, Aging Life Care Association

Who's on your team? In today's environment, it's not about doing it all yourself, but rather it's about your trusted team. How can you allocate your resources wisely, partnering with collaborative professionals to manage your client's needs, their wants, and the issues that put them at risk? This workshop will be highlighting a successful model of how Guardians can partner well with Aging Life Care professionals, providing clinical assessments, robust plans of care, implementation and monitoring of needed services, and documentation of required interventions to support the plan. This all leads to efficient allocation of resources (time and money), greater family/client satisfaction, and enhanced peace of mind.

Uniform Guardianship, Conservatorship, and Other Protective Arrangements Act Benjamin Orzeske, Uniform Law Commission Diana Noel, AARP

The newest Uniform Guardianship, Conservatorship, and Other Protective Arrangements Act (UGCOPAA) was approved by the Uniform Law Commission in 2017. The act is a revision of previous uniform laws on guardianship, but also adds new language to bring guardianship into the 21st century. Come learn more about the act and how it might impact guardianships in your state.

Supported Decision-Making: Alternatives to Guardianship Erica C. R. Costello, JD, NCG, Indiana Supreme Court Rebecca M. Pryor, MSM, NCG, Creative Approaches LTD Melissa Keyes, Indiana Disability Rights Honorable Gregory A. Horn, Wayne Superior Court No. 2 Angela Blevins, NCG, Achieva Resources Corporation, Inc.

This panel will provide information on existing alternatives to guardianship, with a special emphasis on the Working Interdisciplinary Networks of Guardianship Stakeholders (WINGS) project in Wayne County, Indiana, which focuses on supported decision-making as a least restrictive alternative to guardianship.

An encore presentation of the 10:30 session

Deconstructing and Differentiating the Three D's: Dementia, Delirium, and Depression Anne C. Sansevero, RN, MA, GNP, CCM, HealthSense LLC, Holistic HomeCare Associates, LLC

Dementia, delirium, and depression are some of the most commonly observed behavioral disorders seen in aging populations. Yet, oftentimes, because these conditions can present in similar ways, they are confused with one another. This can result in one or more of the conditions going undetected and untreated, significantly impacting the health and well-being of the older adult. In the era of an increasingly fragmented health care milieu, it is becoming more important than ever for guardians to be able to identify key risks, signs, and symptoms associated with all three conditions so that they can advocate for appropriate support, treatment, and management to promote optimal quality of life for these vulnerable populations.

An encore presentation of the 1:30 session

6:00 pm – 7:30 pm Reception with Exhibitors and Live Auction

Spend a fun evening with your fellow participants, visit with exhibitors who are available to answer your questions about their products and services, and enjoy some great food! A highlight of this event is the live auction of donated items; the proceeds benefit scholarships for public and family guardians.

Monday, October 22

7:00 am – 5:00 pm Registration Area Open

7:15 am – 8:10 am Breakfast

8:10 am – 8:15 am Daily Opening Remarks
Wanda Bevington, 2018 Conference Chair

8:15 am – 9:45 am Professional Ethics: The Practitioner's Obligations and Strategies for Success
Viki Kind, MA, KindEthics.com

Explore four ethical viewpoints and how people decide which one is right. Discuss our obligations to stakeholders and how to have moral courage in challenging situations. Learn simple tests you can use to determine, "What's the right thing to do?"

9:45 am – 10:00 am Break with Exhibitors



National Conference on Guardianship

10:00 am – 11:15 am Concurrent Breakout Sessions

Conflicts of Interest **Frank R. Acuña, Acuña Regli** **Tracy S. Regli, Acuña Regli**

Are you aware of the situations that create conflicts of interest? Can you clearly identify who is the client, and to whom you owe fiduciary duties, including the duty of confidentiality? What about attorneys who refer you cases and who may owe duties to you and to others? This is the course for identifying and handling conflicts of interest and avoiding lawsuits!

You've Uncovered Financial Exploitation: Now What? **Victoria Lloyd, Esq., Athena Advocacy**

The media has begun addressing topics of financial exploitation of older adults, and guardians must be prepared when they encounter it. This course will review how to spot it, what steps to take when you think you've discovered it, and provide tools to help manage the situation.

LifeLong Living: Building a Long-Term Culture for Continued Growth **David Seaton,** **LiveOak Living Community**

"Culture change" is the generic name for the de-institutionalization movement in long-term care. Deinstitutionalizing care is achieved by reframing the philosophical view and approach of the person receiving care, changing the design of the facility to represent a home and community, and creating a collaborative organization that reduces unnecessary rules and hierarchy, a model of care referred to as LifeLong Living.

11:15 am – 11:30 am Break with Exhibitors

11:30 am – 12:45 pm Concurrent Breakout Sessions

How to Make the Tough Decisions for a Person Under Guardianship: Sometimes No is the Right Answer **Joyce Meckna, CCM, CM,** **AB ProAdvisor, Advocate Care Services**

As legal guardians, we not only have the authority to make tough decisions, we have a legal obligation to make them. The reason we are guardians is because the court has agreed that a person is not capable of making decisions for himself or herself. There are times when a decision we are sure is in the best interest of the protected person is sure to make the person upset. What now?

WINGS Minnesota: Update and Success **Jill Tilbury, Minnesota Department of Human Services** **Dan Blakley,** **Lutheran Social Service of MN**

Each person to attend will want WINGS in their state after hearing about what Minnesota is doing in their state. We will share with the audience members the accomplishments with WINGS MN and how each state can be just as successful as Minnesota. Minnesota WINGS committee members would like to reveal the impact Minnesota has had in growing the WINGS program. You will understand the tools used to have effective outcomes. An update will be given on the Center for Excellence on Supported Decision Making and how the grant was utilized to enhance our WINGS program.

Cookies & Cream: Dealing With Difficult VIPs: Clients, Beneficiaries, and Stakeholders **Loren "Elle" A. Emmanuel, MBA, CPLF,** **The Ace Fiduciary Group**

A fiduciary's main job is to make sound decisions for the benefit of others, and deal with difficult people. This session will help you learn how to assess and handle a wide variety of difficult people, as well as learn to manage the stress of conflict in your cases. An experienced fiduciary will present a case study, tools, and guide practice discussions at round tables in order to help us polish our professional skills in dealing with high-conflict situations.

12:45 pm – 1:45 pm Networking Lunch

1:45 pm – 2:00 pm Dessert with Exhibitors

Our Silent and Live Auctions Are Fun and Important!

Conference attendees always look forward to the lively auctions that add sparkle to the event and needed income to the Special Projects Fund. Donated items, ranging from jewelry to electronics and fabulous vacations, are auctioned to raise money for NGA to fund worthy projects that are outside of the regular budget. The annual conference [scholarships](#) for family and public guardians come from the auction proceeds.

Even if you can't attend, you are invited to be part of the auction. View our [donation form](#) to learn more.

National Conference on Guardianship

2:00 pm – 3:15 pm Concurrent Breakout Sessions

Supported Decision-Making in Real Life

Tina M. Campanella, Quality Trust for Individuals with Disabilities
Morgan K. Whitlatch, Esq., Quality Trust for Individuals with Disabilities

This session will explore the application of Supported Decision-Making (SDM) principles through the lens of real people and scenarios. Using a case study approach, the session facilitators will explore the benefits and limitations of an SDM approach. The facilitators will share the major SDM advances and gather feedback.

Dementia Care Planning: It's a Family Affair!

Are You Hoping for the Best, but Preparing for the Worst??
Macie P. Smith, Ed.D, LSW, C-SWCM, SW-G
Diversified Training Consultants Group

Currently, there is no cure for Alzheimer's related dementia. This brain-robbing disease has the potential to cripple families' physical, emotional, and financial health. Therefore, quality dementia education is needed. While there is not a CURE, there is CARE.

Special Needs Trusts 101: The Good, the Bad, the Arcane

Stephen W. Dale, Esq. LLM, The Dale Law Firm, PC
George Guerrero, True Link Financial
Louisa Day, True Link Financial

What are Special Needs Trusts (SNT)? What are best practices in SNT administration? In this informative, interactive session, learn about different types of SNTs and pooled SNTs, and how they differ from other trusts, including their benefits, pitfalls, and regulatory differences across states.

3:15 pm – 3:45 pm Break with Exhibitors

3:45 pm – 5:00 pm Concurrent Breakout Sessions

Evaluating Danger and Risk When Choosing to Use Supported Decision-Making

Viki Kind, MA, KindEthics.com

It is challenging to know when to step in versus when to step back so we can feel confident about using Supported Decision-Making. Learn the questions to ask when evaluating danger and how to use the "Evaluating Risk Formula."

Public Guardian Issues, Trends, and Discussion

Lucille Lyon, Retired OC Public Guardian
Michael Handy, AAS, BSc, Kentucky Cabinet for Health and Family Services
Shannon Alvey, MS, NMG, Utah Office of Public Guardian
Jeff Ohlson, Illinois Guardianship and Advocacy Commission, Office of State Guardian

Public guardians may be state, county, or non-profit agencies. Last year, these panelists led a discussion on the different models of public guardian programs and surveyed the session participants. These findings will be presented, along with an interactive discussion of trends and issues facing public guardians.

Healthcare Decision-Making Responsibilities

Lisa J. Berg, CLPF, Lisa J. Berg & Associates

It is an honor and a great responsibility to take on medical decision-making for a client. We need to know how to promote health, how to coordinate doctor/health care provider services, how to work within hospital protocols, how to appeal a discharge that puts our client at risk, and how to engage our client's family and support system to enhance our client's quality of life. This session will teach participants specific ways to assist their clients in healthy aging. There will be focus on the tools of the benefits of humor, gratitude, and forgiveness, identified by Dr. James Abshire in his book: *Live, Love and Let Go: A Doctor's Insightful Approach to Living and Dying*.

Advanced Decision Making: Guardianship 401
Arin Norris, JD, NMG, Lutheran Services Florida
Melissa (Missy) Tackett, NCG, Southern IN Adult Guardianship Services
Kathleen Houseweart, MBA, Lutheran Services Florida
Holly Lapka, LCSW, Therapist in Private Practice

For years, this panel has been presenting "Guardianship 101" to freshly appointed family guardians and interested partner agencies, to spread an understanding of the basic concepts in guardianship. Meanwhile, seasoned guardians are dog-eared their *Standards* and talking themselves through huge decisions with the most difficult of client behaviors, understanding complex medical issues, and navigating complicated relationships. This content is about how to figure out what seems like the most difficult decision you have ever faced, and then come back to do it again. Not for the faint-of-heart guardians.

An encore presentation of the Sunday session

5:30 pm – 12:00 am Open Evening and Dine-Around in Palm Springs

Palm Springs has an outstanding restaurant scene, and this is your chance to experience it! We will make reservations for small groups at various local restaurants. Once you arrive at the conference, visit the local area information table to view menus and sign up for one of the restaurants. This is a great opportunity to explore downtown Palm Springs, continue networking, visit with old friends, and make new connections.

National Conference on Guardianship

////// Tuesday, October 23

- 7:00 am – 11:30 am** **Registration Area Open**
- 7:15 am – 8:10 am** **Breakfast**
- 8:10 am – 8:15 am** **Daily Opening Remarks**
Wanda Bevington, 2018 Conference Chair
- 8:15 am – 9:45 am** **My Life with Autism**
Dakota Maynard
Learn about autism first hand, from Dakota Maynard! Dakota is 23 years old and a person with Autism Spectrum Disorder (ASD). He is very high functioning but still has many autistic characteristics that impact his life on a daily basis. Dakota talks about growing up with autism and the obstacles he has faced, the goals he has accomplished, and the dreams he hopes to achieve. Dakota will explain the different characteristics of this disorder while giving examples from his life. He will discuss how he was diagnosed, explain how autism has affected his family, share some information on his interests, and tell how he copes with daily living. Dakota sees the world from a different perspective. Come and visit it through his eyes!
- 9:45 am – 10:00 am** **Break**
- 10:00 am – 11:30 am** **Ethics Jeopardy!**
Frank R. Acuña, Acuña Regli
Tracy S. Regli, Acuña Regli
One of NGA's most popular sessions has returned to conclude this conference! Join the next best thing to Alex Trebek as you navigate fiduciary ethics! Familiar subjects return, including: *Those Pesky Attorneys*, *Duck and Cover*, *Funny Business*, and *The Family*. And we welcome new topics like *You Did What?? (to Whom???)* and *Just Call Me Blabby*. And remember, your response must be in the form of a question!
- 11:30 am** **Final Remarks, Conference Concludes**



Each year, NGA offers three scholarships for the National Conference on Guardianship, which are supported by the silent and live auctions held each year at the conference. Each scholarship provides one complimentary registration to the conference, and limited travel and lodging expenses. **The application deadline for all scholarships is Friday, June 29.**

NGA Family Guardian Scholarship

This scholarship has been created to reward a family guardian who is a member of NGA or who holds membership in one of NGA's affiliate state organizations.

Fred Kretz Memorial Scholarship for Public Guardians

This scholarship rewards a public guardian who is a member of NGA, or who holds membership in one of NGA's state affiliate associations, and who has earned certification from the Center for Guardianship Certification.

NGA Board Legacy Scholarship

The Board Legacy Scholarship honors past directors of NGA's board and committee volunteers who have worked to establish and execute the mission of the organization.

View complete details and apply online [here](#).

National Conference on Guardianship

Hotel Accommodations



Renaissance Palm Springs
888 Tahquitz Canyon Way | Palm Springs, CA
Phone: 800-468-3571

[Book Online](#)

Discover the Renaissance Palm Springs at the foot of the San Jacinto Mountains, where the day's bright sunshine and night's twinkling stars will enamor and amaze. This Coachella Valley hotel near the Palm Springs Aerial Tramway is the perfect destination. Enjoy easy access to museums, art galleries, and activities in and around downtown. Spacious guest rooms offer plush bedding, marble bathrooms, and modern technologies for a comfortable night's slumber. After an education-packed day, enjoy a late-night swim in the heated outdoor pool, one of the desert's largest, or visit the fitness center. Get cozy in a private cabana and relax under swaying palm trees. And don't forget to treat yourself to a massage or other pampering treatment at the Spa Del Sol. The Renaissance Palm Springs offers a desert resort atmosphere with a cosmopolitan flair.

For reservations, visit the [reservation website](#)
(website works best on Internet Explorer)

or

call the hotel's reservations line at 800-468-3571.

You must identify yourself as part of the National Guardianship Association's 2018 conference to obtain the group rate. It is important that you indicate any special rooming needs or arrangements at the time of this call.

Group Room Rate: \$189.00, plus taxes.

NGA cannot guarantee room availability. The discounted group rate concludes on **Friday, September 14**. Rooms will be available at the discounted rate until that date, or until the block is filled, whichever comes first. Please be aware that the NGA room block usually **fills well before the deadline**. At that point, you are competing with other guests for rooms. Requests for reservations after September 14 will be accepted by the hotel on a space and rate availability basis. For those making reservations prior to the deadline, rooms may also be available at the group rate on the three days prior to and the three days after the actual conference to accommodate vacation planning.

Transportation from Palm Springs International Airport (PSP):

Airport shuttle service, on request, complimentary, from 5:00 am – 10:00 pm.

Estimated taxi fare: \$7.00 one way.

Continuing Education

This main conference program holds a potential of 15.75 credit hours, and a full day of intensives adds another 6.0. Because each accrediting body must approve the program prior to assigning credits, the specific number of credits accepted by each state and for each type of credit will not be definite until October. Keep in mind that not all hours will be deemed acceptable for all types of credit. Duplicate sessions may not be counted twice. Questions about continuing education credits can be sent to Kelly Dolan at education@guardianship.org or by calling NGA at 877-326-5992, ext. 2.

Proof of Attendance

NGA moderators will announce two codes during each session: one at the beginning of the session and another near the end of the session. Codes **MUST** be entered on attendance verification sheets to receive proof of attendance; should you miss one of the codes, please insert the time you arrived/left the session in place of the code. Moderators, staff, and other attendees are unable to repeat these codes, as this is a requirement to verify attendance for continuing education credit; falsifying information can result in loss of education hours for all attendees. Attendance forms must be completed and submitted to receive any credit; NGA strongly advises that all attendees submit attendance verification forms to document your participation should you need record of it in the future.

Verified Certificate of Attendance

The conference registration includes a verified certificate for every attendee who submits an attendance verification sheet, which uses a code system for each session. This certificate can be submitted as proof of attendance to areas of education where NGA did not seek pre-approval.

Guardianship Credits

NGA's conference is approved for guardianship continuing education credits by the Center for Guardianship Certification (CGC) and the California Fiduciary Bureau. The verified certificate is accepted as proof of attendance for these organizations, as well as for Texas Guardianship Certification. NGA also applies to CE Broker (Florida Public Guardian Office) and Professional Guardian Certification Board of Washington State. Certificate fees apply to receive Guardianship CEUs for Florida and Washington.

Continuing Legal Education Credits

NGA has applied to offer Continuing Legal Education credit in California. Certificate fees apply to receive a legal certificate. Individuals outside of California seeking legal credits should contact their state boards prior to the conference to see if their process requires a legal or a verified certificate. A verified certificate is included with the conference fee.

Social Work Credits

NGA applies for social work credits with the NASW. Please verify that your state accepts the NASW approval. For a certificate documenting the pre-approved social work credits, a fee will be required.

Issuing of Certificates

To issue your certificate in a timely manner, NGA must receive your attendance sign-in sheets (which will be enclosed in the conference packet) before you leave the conference. Certificates are downloaded online. All certificates ordered before the conference will be issued within 30 days of the conference. Attendees are urged to check their conference packets upon arrival to obtain the most current continuing education information.



Arrive Early, Leave Late, and Explore Palm Springs!

Decidedly modern yet delightfully mid-century, Palm Springs has a long history as an oasis of relaxation. This sun-soaked southern California destination offers world-class museums and attractions, and an energetic downtown area boasting dining, nightlife, and entertainment options. Palm Springs is brimming with diverse, amazing attractions. From the foothills of Indian Canyons to the great heights of the Palm Springs Aerial Tramway, Palm Springs is packed with exciting attractions that makes the oasis well worth the journey, and there's nothing like a cool pool to end your excursions. Check out some of these attractions when you visit.



Modernism

If you want to explore, but prefer to stay on the beaten path, enjoy a tour of Palm Springs's world-famous collection of midcentury modern architecture on an architecture tour. Learn about the architects, builders, and Hollywood celebrity clients that gave Palm Springs its modernist legacy.



Palm Springs Aerial Tramway

The aerial views of Palm Springs are spectacular day and night, and the Palm Springs Aerial Tramway—vastly unique for a desert destination—is an exciting way to get the lay of the land. The country's only rotating tram ascends 2.5 miles high to an elevation of 8,513 feet, so sprawling views are no less than breathtaking. Reach great heights—literally!—and see the oasis in an unforgettable way.



Palm Springs Art Museum

Founded in 1938, Palm Springs Art Museum is a highly acclaimed cultural institution that has long served as one of the top museums in the valley. Visually engaging and educational, the historical gem offers a contemporary approach to a global art and culture scene. In fact, the permanent collection is notable for its diversity, from international and Native American to contemporary American and Mexican/Latin American art. It's a whole other world to get lost in, thanks to eclectic showcasing that ranges from photography to glasswork. Also, make sure to visit the museum's Architecture and Design Center, a tribute to modernism and architecture of the city.



Walk of Stars

Celebrity history is celebrated in Palm Springs, and you'll see nods to stars to famous former residents, like Frank Sinatra and Bob Hope. In downtown Palm Springs, the Walk of Stars commemorates Hollywood names like Sophia Loren and Mickey Rooney who have made the oasis home or famous, truly amping the rich celebrity history Palm Springs is known for. It's a walk of fame that's famous in itself, and perfect for an afternoon stroll.

Palm Springs Air Museum

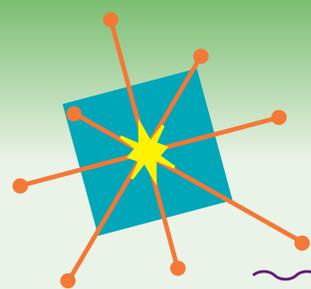
Named as one of the top 14 aviation museums in the entire world by CNN Travel, more than sixty flyable and static airplanes are on display with four fully air-conditioned hangars totaling over 90,000 square feet. Many of the docents on duty in the museum actually flew these planes both in the armed forces and as civilians. The four hangars are organized by region and era, with related exhibits and video displays throughout.



Get Outside

Experience the stunning, natural landscape of the Indian Canyons, Joshua Tree National Park, or the San Andreas Fault. Various tour operators offer Hummer tours, hiking, and horseback riding. Take an afternoon hike through the Indian Canyons, the former ancestral land of the Cahuilla Indians and home to beautifully photogenic natural scenery from oases to waterfalls.





Conference Fees



NGA Member Rates

Early Bird Discounted Registration if Received BEFORE September 1

Full Conference	\$450
Sunday <u>or</u> Monday only	\$200
Tuesday only	\$100
Intensive: Legal & Legislative Review	\$150
Intensive: Half-Day (each)	\$100

Advance Registration if Received

BETWEEN September 1 and September 28

Full Conference	\$475
Sunday <u>or</u> Monday only	\$215
Tuesday only	\$115
Intensive: Legal & Legislative Review	\$165
Intensive: Half-Day (each)	\$125

Regular Registration if Received AFTER September 28

Full Conference	\$550
Sunday <u>or</u> Monday only	\$240
Tuesday only	\$140
Intensive: Legal & Legislative Review	\$180
Intensive: Half-Day (each)	\$150

NGA Non-Member Rates

Early Bird Discounted Registration if Received BEFORE September 1

Full Conference	\$575
Sunday <u>or</u> Monday only	\$275
Tuesday only	\$115
Intensive: Legal & Legislative Review	\$165
Intensive: Half-Day (each)	\$125

Advance Registration if Received

BETWEEN September 1 and September 28

Full Conference	\$620
Sunday <u>or</u> Monday only	\$290
Tuesday only	\$140
Intensive: Legal & Legislative Review	\$180
Intensive: Half-Day (each)	\$150

Regular Registration if Received AFTER September 28

Full Conference	\$695
Sunday <u>or</u> Monday only	\$315
Tuesday only	\$165
Intensive: Legal & Legislative Review	\$205
Intensive: Half-Day (each)	\$175

Not a Member?

Join Now and Pay Member Rates!

Individual Membership	\$180
Org. Membership** first employee	\$260
Org. Membership* add'l employee	\$110
Family, Volunteer, Retired	\$60

**Organization members are entitled to pay member rates for all employees attending the conference, regardless of the member status of employees.

Family Guardian Fee

(applies to members and non-members)

Sunday <u>or</u> Monday*	\$50
Full Conference	\$425

*Family guardian single day rate includes sessions, exhibits, and food functions until 5:00 pm. Family single day rate is for one day only. Anyone wishing to attend additional days will pay the regular single day rate.



Information About Conference Fees

Registration for the Saturday Conference Intensives: Full-day or half-day sessions require additional fees. Payment covers one of these sessions. Registrants may only attend/receive the materials for the session(s) for which they register and pay. Main conference handouts are not included in this fee.

The full conference registration fee includes entrance to all education sessions on Sunday, Monday, and Tuesday; welcome reception and exhibitor reception; breakfast on Sunday, Monday, and Tuesday; lunches on Sunday and Monday; and all breaks, as well as the conference handouts.

Early bird and advance registration discounts exist to encourage early registration so that NGA can better estimate attendance and adequately prepare for conference meals, materials, and space.

One-day registration covers only the day of your choice with the lunch and breaks that day, as well as the conference handouts. Sunday's fee includes the reception that evening.

Guests can be accommodated for some meals. Please email registration@guardianship.org for pricing and availability.



NGA Registration Form 2018 National Conference on Guardianship

Register each person using a separate form, but total payment can be made with one check or credit card.

**Registration must be received before September 1 for the early bird discount.
Late registration fees apply after September 28.**

2018 Conference Registration

Registration fees are available on the previous page.

Complete name, include any designations (please print clearly)

Name as you want it to appear on your name badge, include any designations

Agency/Organization/Company

Mailing address

City, State, Zip

Phone Cell phone if we need to reach you at the conference

Email (Confirmations are only sent by email.)

- I am a family guardian.
- I am a first-time conference attendee.
- I have a special dietary or accessibility need and will require accommodations in order to fully participate in this conference. Please contact me.

To add more people, this form may be photocopied and total fee paid with one check or credit card.

Registration Payment (Federal ID # 36-3591860)

- Please email me a receipt for my records.

Register and pay with credit card online at www.guardianship.org.

Mail form and check (payable to NGA) to: NGA, 174 Crestview Dr., Bellefonte, PA 16823-8516

Fax this form with credit card information to 814-355-2452

Credit Card: Visa MasterCard

Name on Card (print)

Account Number

Expiration Date Security Code

Signature

Early bird registration if received BEFORE September 1

	NGA Member	Non-Member
Full Conference	\$ _____	\$ _____
Sunday or Monday only	\$ _____	\$ _____
Tuesday only	\$ _____	\$ _____
Intensive: Legal & Legislative Review	\$ _____	\$ _____
Intensive: Belts/Suspenders	\$ _____	\$ _____
Intensive: It's Not Just Dementia!	\$ _____	\$ _____

Advance registration BETWEEN September 2 and September 29

	NGA Member	Non-Member
Full Conference	\$ _____	\$ _____
Sunday or Monday only	\$ _____	\$ _____
Tuesday only	\$ _____	\$ _____
Intensive: Legal & Legislative Review	\$ _____	\$ _____
Intensive: Belts/Suspenders	\$ _____	\$ _____
Intensive: It's Not Just Dementia!	\$ _____	\$ _____

Regular registration if received AFTER September 29

	NGA Member	Non-Member
Full Conference	\$ _____	\$ _____
Sunday or Monday only	\$ _____	\$ _____
Tuesday only	\$ _____	\$ _____
Intensive: Legal & Legislative Review	\$ _____	\$ _____
Intensive: Belts/Suspenders	\$ _____	\$ _____
Intensive: It's Not Just Dementia!	\$ _____	\$ _____

Additional Registration Options

Family Guardian Single Day	\$ _____
Certificate (order certificate on next page)	\$ _____
Not a member? Save by joining NGA today	\$ _____

Total for Conference Registration: \$ _____

No refunds will be issued after Monday, October 8. Cancellations after October 8 will receive a copy of materials from the conference. Changes or cancellations must be made in writing to Terri Breon at registration@guardianship.org. Substitutions may be made in advance.



Certificate of Attendance Order Form

**NGA Conference on Guardianship
October 20 – 23 | Palm Springs, CA**

Any person needing a Certificate of Attendance for the Center for Guardianship Certification or California Fiduciary Bureau WILL NOT need to purchase a certificate. A Verified Certificate of Attendance will be provided following the conference for every attendee who submits the Attendance Verification sheets onsite. (Please allow 30 days following the event for receipt of certificate.)

Those areas listed below do require additional effort on the part of the NGA staff to pre-approve the continuing education credits, therefore additional fees are required.

<input checked="" type="checkbox"/>	Certificate Type	Certificate Use	Fee for Certificate
	Guardianship	Only Florida or Washington (All other guardianship areas accept the verified certificate already provided.)	\$25.00
	Legal	Used for California (or any other state that accepts California's approval)	\$50.00
	Social Work	Certificate may be used for all states accepting NASW approval	\$50.00

Fill out clearly and completely information as you would like it to appear on your certificate

State for which requesting certificate: _____ License/Bar/Guardian # if applicable _____

Name _____

Email _____ Phone _____

Company _____

Address _____

City _____ State _____ Zip Code _____

Total Payment for Order \$ _____ Please email me a receipt _____

_____ Visa	_____ MasterCard
Card # _____	Sec. Code _____ Exp. Date _____
Name on Card _____	
Signature _____	

MAIL: Enclose check or money order, payable to NGA: 174 Crestview Drive, Bellefonte, PA 16823-8516.
FAX: Provide credit card information and fax to 814-355-2452.