



**National Conference on Guardianship
October 20 – 23, 2018
Speaker Contact Information and Biographies**

Frank R. Acuña

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Frank R. Acuña is a founding partner of Acuña ❖ Regli, LLP, with offices located in the San Francisco Bay Area. Acuña ❖ Regli has built its practice around the needs of licensed professional fiduciaries throughout the State of California and assists National Guardianship Association affiliates with their California matters. He is a California State Bar Certified Specialist in Estate Planning, Probate, and Trust Law and was admitted to the California Bar during 1985.

Frank's practice involves estate planning, estate and trust litigation, and serving as a mediator in estate and trust disputes. He is a nationally known speaker who teaches continuing education for local Bar Associations and paralegal associations as well as the American Institute of Certified Public Accountants, the National Association of Enrolled Agents, and the National Guardianship Association, and their state and local affiliates. He has also served as adjunct faculty at St. Mary's College of California, U. C. Berkeley, and the U.C.L.A. School of Law.

Leesa Arthur, CPG

Certified Professional Guardian, Summit Guardian Services and Guardianship Services of Seattle
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Leesa Arthur is a professional fiduciary licensed as a Washington State Certified Professional Guardian and recognized as VA Representative Payee in Northern New York State. Leesa has been working as a professional fiduciary since 1994, when she joined Guardianship Services of Seattle as a Financial Manager. Through her employment at GSS, Leesa explored various aspects of guardianship and fiduciary field by becoming a Guardian ad Litem and a Registered Investment Advisor Representative. Leesa later became the Director of Capitol Guardianship Services, as subsidiary of GSS. At this time, Leesa continues her work at GSS and acts as a designated CPG and Co-Director of Summit Guardian Services in Olympia, Washington.

Through the years, Leesa has been active in various aspects of guardianship education. She was recruited to present and organize continuing education programs when Washington State began recognizing individuals and agencies as professional guardians. She participated in working groups that developed standardized forms for reports and drafted a manual that provided guidance to individuals entering the field. In 2008, Leesa joined the curriculum development team for the University of Washington - Certificate in Guardianship program. Leesa has acted as the lead content instructor of that program since its inception. Leesa has also been a presenter at the NYSARC Symposium on Guardianship and at the 2012 NGA conference in Portland, Oregon.

Steven Barlam, MSW, CCSW, CMC

Former President, Aging Life Care Association and Chief Professional Officer/Founder, LivHome
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Since 1985, Steve Barlam has worked exclusively in the field of Geriatrics, working directly with clients and their families, as well as developing innovative service delivery models, with a passion for Care Management.

He has served as a leader in the Professional Geriatric Community, sitting on numerous National and Local Boards, and served as President for the National Association of Professional Geriatric Care Managers, currently the Aging Life Care Association.

Steve is a regular lecturer at local universities, and National conferences on topics relating to Care Management, Technology, and Patient/Client Care. He firmly believes in the power of education and coaching to help professionals enhance their skills to positively impact their clients' lives as well as their practices.

Lisa J. Berg, CLPF

California Licensed Professional Fiduciary, Lisa J. Berg & Associates
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Lisa J. Berg began her work in conservatorships with the Alameda County Public Guardian's Office in Oakland, CA as well as the Sacramento Public Guardian's Office. For the past 22 years, she has been the President of Lisa J. Berg & Associates, Inc. and currently has three full time employees, one of whom just obtained her California license. She particularly enjoys advocating for mental health consumers and special needs trust beneficiaries. Her medical social worker background as well as school social worker duties have enhanced her advocacy in schools at Individual Education Plan (IEP) conferences to insure the highest level of service possible for her clients.

Dan Blakley

Senior Director of Guardianship Options and Pooled Trust Services, Lutheran Social Service of MN
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Dan attended the University of Wisconsin and attained Bachelor degrees in Finance and Real Estate. Prior to his arrival at Lutheran Social Service of MN he worked primarily in banking and finance, but wanted to make a shift in his career. He was hired at Lutheran Social Service of MN 5 years ago to manage the Conservatorship side of the program where they manage approximately \$60 million in assets for individuals throughout Minnesota and North Dakota. He was promoted the Sr. Director of the entire Guardianship Options Program as well as Pooled Trust Services 2 years ago. Between those two programs Lutheran Social Service of MN serves approximately 1,500 individuals with approximately 50 employees.

Angela Blevins, NCG

Guardianship Program Manager, Achieva Resources Corporation, Inc.
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Angela Blevins has worked for Achieva Resources for nineteen (19) years. She started her career serving children and adults with disabilities as a Receptionist for Achieva Resources. She was promoted to Administrative Assistant to the President/CEO and then promoted again to Guardianship Program Manager in 2013. She is a graduate of Richmond High School. She received her certification to become a National Certified Guardian in 2014. Angela is married to Jeff and they have a twelve (12) year old son, Casey. Angela enjoys reading, playing billiards, and traveling around Indiana, Ohio and Kentucky watching her son play travel baseball.

Tina M. Campanella

CEO, Quality Trust for Individuals with Disabilities
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Tina Campanella is the CEO and Executive Director of Quality Trust. She has established Quality Trust as a strong, independent advocacy organization and leads national efforts around increasing the use of supported decision-making. With over 40 years of experience, she is acknowledged as an exceptional thinker and leader in the field of supporting people with disabilities

Heather L. Connors, Ph.D.

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Heather L. Connors, Ph.D., is Director of Research for Guardian Community Trust, Inc. (GCT), a non-profit organization located in Andover, Massachusetts, that advocates for guardianship reform through research, education and an active grant-making program. Heather is an associate lecturer in the Masters in Aging Services Program at the University of Massachusetts Boston and has done ground-breaking research on guardianship issues. Prior to joining GCT, Heather was Guardianship Program Manager for Jewish Family & Children's Services in Worcester, Massachusetts. Heather received her undergraduate degree in Sociology from The College of the Holy Cross and her Ph.D. in Gerontology from the University of Massachusetts Boston.

Erica C. R. Costello, JD, NCG

Staff Attorney, Adult Guardianship Office, Indiana Supreme Court
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Erica C. R. Costello, Esq., is the Staff Attorney for the Adult Guardianship Office with the Indiana Supreme Court. This office serves as a resource to courts and the public on all matters relating to adult guardianship. Since 2013, more than \$3.5 million in matching grant funding has been awarded to 18 volunteer-based guardianship programs, currently serving seniors and incapacitated adults in 42 counties throughout Indiana. Prior to joining the Supreme Court, Ms. Costello served for eight years as the Director of Adult Protective Services (APS) with the St. Joseph County Prosecutor's Office in South Bend, Indiana. Ms. Costello has a Bachelor of Arts in History and Political Science from Indiana University-Bloomington and a Juris Doctor from Brandeis School of Law, at the University of Louisville, in Kentucky. Ms. Costello is a nationally certified guardian and a member of the Indiana State Bar Association, American Bar Association, and Indianapolis Bar Association and is licensed to practice law in the State of Indiana.

Traci Cucinotta, MSW, MBE, LICSW

Education and Training Specialist, Guardian Community Trust
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Traci Cucinotta, MSW, MBE, LICSW is the Education and Training Specialist for Guardian Community Trust, Inc. (GCT), a non-profit organization located in Andover, Massachusetts, that advocates for guardianship reform through research, education and an active grant-making program. She earned a Bachelor's of Social Work from West Virginia University, a Master's of Social Work from Salem State University and a Master's of Bioethics from Harvard Medical School. In addition, she has studied Ethics and Bioethics at Gordon Conwell Theological Seminary and Trinity International University. Her work as a Clinical Social Worker spans critical care, dementia, chronic mental illness and end of life. Her focus is to educate guardians on the principles of decision-making, particularly pertaining to ethics of end-of-life care. She is a member of NASW, the American Society for Bioethics and Humanities, National Guardianship Association, Board of Directors for Massachusetts Guardian Association and has served on the Ethics Advisory Committee for Northshore Medical Center. She is currently a visiting instructor in the Graduate School of Social Work at Salem State University.

Stephen W. Dale, Esq., LL.M

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Stephen W. Dale is an attorney and disability rights advocate, serving on boards and committees of disability rights organizations. He is a frequent speaker on a variety of disability-related topics across the country, and is the recipient of a NAELA Powley Award. Through his practice, Mr. Dale teaches courses to the public, professional trustees, and other attorneys on special needs trusts and trust administration with an emphasis on achieving independence while maintaining essential government benefits.

Kendra Daniel, MGS, JD

Director, Adult Support and Advocacy, Lutheran Metropolitan Ministry
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Ms. Daniel obtained a Master of Gerontological Studies from Miami University and a Juris Doctorate from Cleveland State University. These academic studies afforded her the opportunity to learn and develop foundational knowledge of the social, psychological and economic aspects of older adults.

Ms. Daniel has worked throughout her career around the advocacy for older adults through the Greater Cleveland Volunteers, Cleveland State University, the Center for Community Solutions, and Cuyahoga Metropolitan Housing Authority. Through these experiences, she honed her skill set of program development, project management, capacity building, program oversight and strategic planning. Currently, Kendra serves as the Director of Adult Support and Advocacy and oversees the guardianship programs of Lutheran Metropolitan Ministry (LMM). The mission of LMM's guardianship programs is to enhance the quality of life of indigent, incompetent, adults in Cuyahoga and Lorain Counties by providing legal guardians to serve as concerned, caring advocates and surrogate decision makers when a less restrictive alternative to guardianship is not available.

Ms. Daniel has been a volunteer guardian for over 14 years and served in the US Peace Corps working with "pensioners" in Bulgaria. Ms. Daniel has served on the boards of the Northeast Ohio Peace Corps Group and the Ohio Association of Gerontology and Education.

Louisa Day

Trust Program Manager, True Link Financial
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Louisa Day is the Trust Program Manager at True Link Financial. She has dedicated the majority of her career to serving Special Needs Trusts clients and beneficiaries. She uses her expertise to ensure True Link's trust clients are getting the most out of their services. Previously, she was an Assistant Vice President at Wells Fargo Trust Services and a Master Pooled Trust Assistant Manager at The Arc of Texas. She is based in Austin, Texas.

Loren "Elle" A. Emmanuel, MBA CLPF

Founder and Certified Professional Fiduciary, The Ace Fiduciary Group
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Loren "Elle" A. Emmanuel was born in Hollywood on a hot August night. She is a Cal Alumni; graduating from UC Berkeley with honors and a focus on Urban Economics. She worked in high finance – the secondary mortgage market - until she earned her MBA from the Marshall School of Business at USC.

Loren is a Certified Professional Licensed Fiduciary in California. She has handled a variety of estate situations from Conservator to Charitable Trusts, since 2000. She has a wealth of knowledge about this topic and knows her way around probate; conservatorship; and trust administration. She has served as an expert witness in trust litigation and knows the "Good, The Bad & The Ugly" about family conflict in estates.

Loren is a member of numerous professional groups; including the Professional Fiduciary Association of California, The National Guardianship Association, and an affiliated member of the Contra Costa County Bar. She teaches professional fiduciaries, attorneys, tax professionals and lay trustees in a number of topics, including: "How To Close An Estate Without Being the Turkey at Family Thanksgiving"; "Under The Hood": An Overview of Court Accountings and Fiduciary Ethics; "Preserving Your Trust For the Benefit of Your Legacy"; and, today's discussion about dealing with difficult VIP's.

Steven D. Fields

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Steven D. Fields has been the Court Administrator/Senior Attorney for Tarrant County Probate Court No. Two, Fort Worth, TX, since 1999. He has been an adjunct professor at Texas A&M School of Law since 2010, and is a member of the Texas Bar REPTL guardianship legislation committee. He was on the National Guardianship Association board from 2000 to 2009, and was the President of NGA in 2008. He was the president of the Texas Guardianship Association in 2004-05, and was on the TGA board from 2000 to 2006 and 2016 to present. He was the Chair for the Texas Senior Advocacy Coalition for 2006-07, and was on the TSAC board from 2003 to 2009. He was the initial Texas Guardianship Director in 1998-1999. He served for almost five years as Court Investigator for the Tarrant County Probate Courts specializing in the filing of guardianship applications for indigent incapacitated individuals. He has been a licensed attorney since 1987 with a JD degree from the University of Oklahoma, and he specialized in guardianship, estate planning and probate law for various Texas law firms for 6 years. He has a BA degree in English from Oklahoma Christian University. He is married with a 15 year old daughter, and is an avid collector of musical recordings.

Ashley Glazewski, Esq.

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Ashley L. Glazewski is an associate attorney at Furman Kornfeld & Brennan LLP. Ms. Glazewski's practice focuses on insurance coverage analysis and litigation, monitoring counsel and program/claims administration, lawyers' professional liability, and miscellaneous professional liability litigation. During her time at Furman Kornfeld & Brennan LLP, Ms. Glazewski has contributed to various articles and publications regarding insurance defense matters, and has been a speaker at the Professional Fiduciary Association of California's annual conference. Ms. Glazewski received her Juris Doctor, *cum laude*, from New York Law School, where she served as a Staff Editor of the *New York Law School Law Review*. Ms. Glazewski is admitted to practice law in the State of New York.

Paul R. Greenwood

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Deputy District Attorney Paul Greenwood was a lawyer in England for 13 years. After relocating to San Diego in 1991, he passed the California Bar and joined the DA's office in 1993. For the past 22 years, Paul has headed up the Elder Abuse Prosecution Unit at the San Diego DA's Office. In 1999, California Lawyer magazine named Paul as one of their top 20 lawyers of the year.

He has prosecuted more than 650 felony cases of both physical and financial elder abuse. He has also prosecuted ten murder cases, including one death penalty case.

In March 2018, Paul retired from the San Diego DA's office to concentrate on sharing lessons learned from his elder abuse prosecutions with a wider audience.

Marilyn Halpern

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Marilyn Halpern lives in Denver, CO with her husband, son and two wonderful dogs. She pursues many endeavors, including her advocacy and care of individuals in Guardianship Services and volunteer efforts including an appointment on the Policy Council for Denver Head Start. She is a Licensed Social Worker and obtained her Master's Degree at Case Western Reserve University. Additionally, she is a certified End of Life Doula. She has enjoyed a robust career of over 25 years serving children in foster care, elders in home health care, and individuals with developmental disabilities across the lifespan. A practice of compassion and respect have been the hallmark of her medical social work practice. She enjoys hiking, reading and all facets of wellness.

Terry W. Hammond, JD, NCG

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Terry W. Hammond, J.D., N.C.G., is the owner of Terry W. Hammond Consulting in Austin, Texas, and is the manager of Terry W., Hammond & Associates, PLLC, Attorneys and Counselors at Law located in El Paso and Franklin, Texas. Mr. Hammond served as president of the National Guardianship Association in 2000, was executive director of NGA from 2006 – 2010, and was elected by NGA members to the board of directors from 1995 – 2006 and again from 2013 to present. Mr. Hammond presently chairs the NGA State Affairs Committee and the National Guardianship Network. Mr. Hammond is Vice President of the Texas Guardianship Association and chairs the TGA public policy committee. Mr. Hammond's consulting practice provides expert witness, mediation, and other support for guardians and conservators, and his law practice has focused on guardianship, adult protection, probate and mental health law since 1993.

Michael Handy, AAS, BSc

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Michael "Mike" Handy began his guardianship career in 2007 as a field worker for the Commonwealth of Kentucky's state guardianship program. In 2008, he was promoted to supervisor over the Jefferson County guardianship region. In 2010, he was promoted to branch manager for the entire state and, in 2014, he became an assistant director for the program.

Mike has been a member of the National Guardianship Association for the past several years and has attended the past six national conferences. He was recently re-elected to the National Guardianship Association's board of directors. He enjoys attending the conferences to share his Kentucky guardianship experiences, but also to learn what other states are doing with guardianship.

Mike earned an associate degree in Human Services from Jefferson Community College in 1994 and his undergraduate degree in Sociology from the University of Louisville in 2004.

Mike has more than 30 years of experience in social services and more than ten years of experience in the financial industry.

Lori Hefner, MA, MBA, CLPF

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Ms. Hefner is one of 35 certified archivists and records managers in the United States. She has over 30 years in the two professions, taught the subject matter at the University of California, Berkeley Graduate School of Information Studies, served as records custodian in some of the largest litigation cases in the US, drafted state laws adopted by State Legislatures, was personally commended by the US Department of Energy Secretary Hazel O'Leary for her contributions on the "Human Radiation Experiments" and has worked in Western Siberia for the US Department of Energy and the Russian Atomic Agency in a joint venture. She has also taught "E-Commerce, Public Policy and the Law" at San Jose State University Extension. She is now a Gerontologist and State Licensed Fiduciary in California. Ms. Hefner has given this presentation twice at the annual meetings of the Professional Fiduciaries Association of California (PFAC) over a 5 year period.

Lawrence D. Hilton

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Lawrence D. Hilton, founder of Dominion Insurance Services, serves professionals in a wide range of disciplines. His prior law practice focused on professional liability defense and insurance coverage. He belongs to the California and Utah Bar Associations, holds insurance licenses in all 50 states, and is a Lloyd's of London coverholder.

Gregory A. Horn

Judge, Wayne Superior Court No. 2
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The Honorable Gregory A. Horn has been Judge of the Wayne Superior Court No. 2, a state trial court of general jurisdiction in Richmond, Indiana, since January 1, 1997. He is a past member of the Board of Managers of the Indiana Judges Association and is a former Chairman of the Civil Instructions Committee of the Indiana Judges Association, the group responsible for drafting pattern jury instructions used in the Indiana trial courts, as well as the Civil Benchbook Committee of the Indiana Judges Association. He currently serves on the Judicial Administration Committee of the Indiana Judges Association.

Prior to assuming the bench, Judge Horn was a practicing attorney with the Richmond, Indiana law firm of Harlan, Boston, Bever & Horn. He obtained his B.A. degree in political science from Indiana University – Bloomington in 1976 and his J.D. degree from Indiana University McKinney School of Law – Indianapolis in 1980. He is admitted to practice before the courts in the state of Indiana including the United States District Court for the Southern District of Indiana. Judge Horn was also admitted to practice before the United States Supreme Court in 1985. He serves as an adjunct faculty member at Indiana University – East in Richmond, Indiana, where he teaches The American Criminal Justice System, Substantive and Procedural Criminal Law, and American Constitutional Law. In addition, he has formerly taught practical family law and business law at I.U. East.

Judge Horn has been a presenter and/or chair at the Indiana Continuing Legal Education Forum seminars entitled “An In Depth Analysis Of Selected Family Law Issues (1992),” “Juristic Park: Post-Dissolution Modification Actions (1995),” “Child Custody & Support (1996),” “Child Support & Dissolution Matters (1998),” “Child Support & Custody (2000),” the “Indiana Family Law Institute (2004),” and the National Family And Juvenile Judges Association national conference in Chicago in the summer of 2009. He is the 2015 state of Indiana recipient of the Arc of Indiana Community Involvement Award for his work with Indiana guardianships.

Sally Balch Hurme, JD

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Sally Balch Hurme, J.D., has led the national conversation on many of the legal issues of concern to older persons, their families, and their caregivers. Whether the issue is how to make decisions for others or plan for what comes next, she has focused her professional career on explaining the law so everyone can understand it. Recently retired after more than 20 years at AARP, she has focused on providing support and resources for caregivers.

For the past two decades, Hurme’s volunteer commitment has focused on the rights of adults with diminished capacity and the reform of guardianship policy and procedures. She has served multiple terms on the boards of the National Guardianship Association and the Center for Guardianship Certification, where she has been instrumental in developing standards for guardians and criteria to improve professional competency. She’s been an adviser to the Uniform Law Commission in drafting the uniform guardianship jurisdiction act and revising the uniform guardianship act. As chair of the National Guardianship Network, a collaboration of 11 national organizations working to improve guardianship, she led the planning for the 2014 World Congress on Adult Guardianship. As a member of U.S. State Department delegation, she participated in the drafting of the Hague International Convention on the Protection of Incapacitated Adults. In 2008, she was honored by the National College of Probate Judges with the William Treat Award for excellence in probate law.

Hurme is the author of the award-winning ABA/AARP Checklist series: *Get the Most Out of Retirement*, *Checklist for My Family*, *Checklist for Family Caregivers*, and *Checklist for Family Survivors*, and managed the 2016 updating of NGA’s *The Fundamentals of Guardianship*.

Andrew R. Jones

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Andrew R. Jones is a Partner in the New York City law firm of Furman Kornfeld & Brennan LLP. Mr. Jones’ practice focusses on professional liability and includes: the direct defense of lawyers, fiduciaries, and other professionals; and giving advice to domestic and international insurers, including on insurance policy language, management, and claims

handling across the United States and abroad. Mr. Jones has tried cases in Federal and State Courts, and has represented insurers in international and domestic arbitrations. Mr. Jones drafts and manages insurance policies and programs for insurers. Mr. Jones has lectured on professional liability defense matters, including at PFAC, the Arizona Fiduciary Association, the New York State Bar Association, and the American Bar Association. Mr. Jones is admitted as an attorney in New York, and is a Solicitor admitted to practice in England.

Melissa Keyes

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Melissa Keyes is the Legal Director for Indiana Disability Rights, the state's protection and advocacy agency that provides legal services to individuals with disabilities. Melissa received her law degree from the Indiana University Robert H. McKinney School of Law in Indianapolis. She was the Editor-in-Chief for the *Indiana Health Law Review*, Volume 8, and was selected as the 2010 Program on Law and State Government Fellow. During law school, Melissa served as a research and policy consultant to the Autism Society of Indiana. Before becoming an attorney, Melissa worked at Riley Hospital for Children in the autism clinic as a research specialist at which time she earned her Master's degree in clinical psychology.

Viki Kind, MA

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Viki Kind is a clinical bioethicist, professional speaker and hospice volunteer. Her award winning book, *The Caregiver's Path to Compassionate Decision Making: Making Choices For Those Who Can't*, guides families and professionals who are making decisions for those who have lost capacity. Viki is known as "The People's Bioethicist," because she is a rare individual who bridges two worlds, that of the health care professional and of the family struggling to make the right decision. She is an honorary board member of the Well Spouse Association and has been a caregiver for many years for six members of her family.

Victoria Lloyd, Esq.

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Ms. Lloyd is the founder and principal of Athena Advocacy, which focuses on providing guardianship, fiduciary, and care advocacy services. She leads a team who serves clients throughout New England with individually tailored services. Ms. Lloyd is also called upon to provide training on financial exploitation for private sector entities, law enforcement, and public agencies.

Prior to launching Athena Advocacy, she was an investigator for the State of Vermont Adult Protective Services and specialized in investigating reports of financial exploitation. Ms. Lloyd founded and has chaired FAST (Financial Abuse Specialist Team) of Vermont since 2012 and launched FAST of America in 2015, a nationwide multi-disciplinary network of financial exploitation responders working to prevent and mitigate financial exploitation.

Darryl J. Lynch

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Mr. Lynch has worked with Guardians and Trustees throughout the years. He has recommended best practices for attorneys and guardians across the country. Shortly after earning his MBA from Duke University in Durham, NC he began his over 30 year career in the financial services industry. His experience is unparalleled as he has been a member of the National Guardianship Association (NGA) since 2002 and currently sits on the Center for Guardianship Certification's (CGC) review board.

He has spent over 29 years at Oppenheimer & Co. Inc., where his experience and the firm's resources assist him in making knowledgeable recommendations and providing a high level of client service. Originally growing up in the St. Louis area, Mr. Lynch now resides in Kirkland, WA. He is a member of the Illinois Guardianship Association (IGA) and the Washington Association of Professional Guardians (WAPG) and Guardian/Conservator Association of Oregon (CGA). He has taught classes and given many presentations for CE for various associations of Professional Guardians, Attorneys and Fiduciaries. He also works with high net worth investors and charitable organizations. His work demonstrates his commitment to helping invest and protect assets by providing independent financial insights.

Mr. Lynch is also a member of Oppenheimer's 2015 Executive Council, a prestigious designation awarded to our top Financial Advisors. In his free time, he enjoys mountain biking, science and volunteering at various organizations throughout the Northwest.

Lucille Lyon, MPA

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Lucille Lyon, currently retired, has over 30 years of experience working in the public fiduciary field. She has held positions as the Orange County Public Guardian, Division Chief for the Los Angeles Public Guardian and Chief Deputy for Riverside County. In these positions she was responsible for managing the Office of the Public Guardian serving individuals placed under conservatorship pursuant to the Welfare and Institutions Code (LPS) and Probate Code.

Ms. Lyon holds a Master's in Public Administration from California State University at San Bernardino and a Bachelor of Arts from the University of Southern California. She is a lifetime member of the California Association of Public Administrators, Public Guardians and Public Conservator. She is currently serving on the Board of Director on the National Guardianship Association.

Scott MacDonald

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Scott MacDonald is the founder and leader of the Special Needs Team at Merrill Lynch, a group of Financial Advisors and Client Associates dedicated to enhancing the long-term well-being of special-needs, disabled and elderly individuals. Scott joined Merrill Lynch in 1987 and has spent his entire career addressing the unique needs of society's most vulnerable members.

Passionate about his work, Scott is a recognized authority on wealth planning and investment management for Special Needs Trusts and other court-supervised trusts, as well as probate investing for Conservatorships and Guardianships. He offers extensive knowledge of California Probate Code restrictions on investments, as well as the terms of the Uniform Prudent Investor Act. Scott facilitates close collaboration with attorneys, caregivers, trustees, fiduciaries, benefits counselors, and other professionals. A regular lecturer and media contributor, he is the author of numerous articles and publications related to special-needs and elder financial strategy.

Scott earned his B.S. in Finance and his B.A. in Economics with Honors from the California State University system. He is the recipient of the prestigious David Brady award, bestowed upon the Merrill Lynch employee who goes beyond expectations in his dedication to clients.

Dakota Maynard

Dakota Maynard is a 23 year old individual with high functioning autism. He is a busy student, attending the Fire Protection Program at Fox Valley Technical College in Appleton, Wisconsin. Dakota was brought up in a large, loving, fun filled family mixed with treatment foster children, special needs adults, adopted children, biological children and two nieces and a nephew. Dakota has traveled the world extensively, has several exciting high interests that he loves to discuss and spends a large portion of his time volunteering and helping others. His goal in life is to become a fireman/paramedic. Dakota has been presenting on autism for several years and feels it is important to share his experiences, so others may learn more about this developmental disorder.

Joyce Meckna, CCM, CM, AB ProAdvisor

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Joyce Meckna is a Certified Care Manager working in the Boulder Colorado area. She has an extensive business background including mediation and managing a successful home healthcare placement agency. This experience has led her to work as a Consultant/Manager for a Legal Guardianship Agency and bringing the combination of these experiences to enrich the lives of seniors and other protected populations is where she has found her calling.

J.J. Mesko-Kimmich, M.Ed., LPC

Director of Volunteers, Volunteer Guardian Program
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J.J. has a Bachelor's Degree in Individual, Family Studies & Gerontology, and a Master of Education in Community Counseling, both from Kent State University in Kent, Ohio. She has spent over 20 years working in community engagement and social services. She conducted numerous therapeutic and supportive groups for social workers, counselors and staff. As the Director of Volunteers, she coordinates the Volunteer Guardian Program. She works closely with the Summit County Probate Court and several Summit County organizations to find a guardian for indigent wards.

Mrs. Mesko-Kimmich is a Licensed Professional Counselor with the State of Ohio, and works with Lora Hoffstetter Counseling & Associates. She is also an Adjunct Professor in the College of Business at Kent State University. J.J. is on the national Board of Directors for the National Guardianship Association that serves over 1,100 members. In addition to various committees, she is a member of the Ohio Guardianship Association, DOVIA (Director of Volunteers in Agencies), the IEWD Committee and the Knowledgeable Network of Women (KNOW). J.J. was the Volunteer Administrator of the Year in 2017, the 2016 JFS Employee of Distinction and she received the "30 for the Future" Award in 2012 from the Greater Akron Chamber of Commerce. The Volunteer Guardian Program also earned the Volunteer Program of the Year in 2017 from DOVIA.

In her free time, she enjoys walking, volunteering and traveling with her family. J.J. resides in Ohio with her husband of over 15 years and their two daughters.

Diana Noel

Senior Legislative Representative, AARP
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Diana Noel is a Senior Legislative Representative with AARP's Department of Government Affairs. Since joining AARP in 2011, Diana has served as an issue expert primarily in the areas of elder abuse, financial exploitation, adult guardianship, power of attorney, and asset protection. In her position, she provides technical assistance to AARP's 53 state offices to further their strategic engagements in state and local level legislative and regulatory advocacy.

Prior to joining AARP, Diana served as the Director of the Labor and Economic Development Committee with the National Conference of State Legislatures. She lobbied Congress on behalf of the nation's state legislators on a host of issues including international trade, disability and employment, arts and culture, and economic development.

Diana graduated from the University of Maryland College Park with a Bachelor of Arts degree in Government and Politics and received her Master of Public Administration degree from Bowie State University. In her spare time, Diana is a 5k coach and enjoys running half marathons.

Arin K. Norris, JD, NMG

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Born and raised in Indiana, Arin K. Norris graduated from the Honors College at Ball State University in 1995 as a political science major. Recognized for pro bono service during law school, Arin earned her Juris Doctorate in 1999 from Indiana University School of Law-Indianapolis. Arin was admitted to the Indiana Bar in 1999, and remains an attorney there in good standing.

After law school, Arin worked in the Indiana Consumer Protection Division under Attorney Generals Jeff Modisett and Karen Williams. She also completed a certified law internship with Marion County Prosecutor Scott Newman, before moving on to run the Oversight Division for the Department of Workforce Development. More recently, Arin became a National Master Guardian and provides guardianship services to elderly and disabled adults through the non-profit organization Lutheran Services Florida. Arin is also an Indiana registered family law mediator. She serves on the Board of Directors for the National Guardianship Association, and is Co-Chair of the Membership Committee, serving also on the State Affairs Committee and the Conference Committee.

In addition to her legal background, Arin has worked with those struggling with homelessness, mental illness and unemployment. She has also served as a Court Appointed Special Advocate/Guardian Ad Litem. Arin has been trained as a forensic interviewer under the "Finding Words" methodology.

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Jeff Ohlson, M.A., MSW, NCG has a Master's degree in Rehabilitation Administration (concentrations in counseling and vocational evaluation), and a Master's degree in Social Work. His experience includes working for the Office of State Guardian, Southern Illinois Case Coordination Services, Rehabilitation and Vocation Education (RAVE) a Sheltered Workshop and CILA provider, Southern Illinois Regional Social Services (formerly Jackson County Community Mental Health), Specialized Training for Adult Rehabilitation (START), and Countryside Association for the Handicapped. He has more than 30 years' experience working with persons with developmental disabilities, mental illness, traumatic brain injury and age related disabilities. He was also one of the original VGAP volunteers – VGAP is Volunteer Guardianship Program developed by the Illinois Guardianship and Advocacy Commission.

Benjamin Orzeske

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Benjamin Orzeske is Chief Counsel at the Uniform Law Commission, a non-profit law reform organization formed in 1892 and made up of volunteer lawyers from all fifty states. The ULC drafts uniform and model state legislation on topics for which uniformity is desirable and feasible, and works for the enactment of uniform laws in state legislatures. Ben supervises the ULC legislative staff at its headquarters in Chicago and acts as the organization's internal counsel. He is primarily responsible for enacting the Uniform Commercial Code and uniform acts concerning real property, trusts and estates, investment management, and elder law.

Peter C. Palumbo, AIF®

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Peter joined Oppenheimer & Co. Inc. in 2007. Peter is an Accredited Investment Fiduciary (AIF) and a member of the National Guardianship Association (NGA). Building relationships based on integrity and trust is important to him.

At Oppenheimer, as part of The Palumbo Group, he provides customized financial strategies to clients striving to optimize professional wealth management and estate planning for wealth transfer between generations.

Peter graduated from Saint Louis University High School (SLUH), then Marquette University with a double major in marketing and organizational management. He holds the General Securities Representatives License (Series 7) and Uniform Investment Adviser Law Examination (Series 65). An active member of his community, he feels it is important to give back. Palumbo Both in St. Louis and Chicago, he has participated in charitable drives by alumni and religious organizations as well as Jesuit retreats. Peter is a mentor and Friend of Loyola Academy of Saint Louis. He is also an enthusiastic golfer and active follower of his favorite teams – the St. Louis Cardinals, Chicago Bears and Marquette University Basketball.

Dari Pogach

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Dari has worked on adult guardianship reform and alternatives to guardianship for several years. Prior to joining the Commission, she provided direct legal services to indigent clients with disabilities. She represented individuals with mental illness as a staff attorney at Disability Rights D.C. of University Legal Services, the District of Columbia's protection and advocacy program for people with disabilities. She assisted individuals with developmental disabilities seeking alternatives to guardianship as a staff attorney at the Quality Trust for Individuals with Disabilities. Dari has also represented respondent parents in child abuse and neglect cases in New York City. Dari has substantive experience in policy and legislative advocacy, and has testified at numerous legislative hearings, provided comments to proposed regulations, and written public reports with recommendations for improving local laws and practices. She received her B.A. from the University of Pennsylvania and her J.D. from Washington College of Law.

Rebecca M. Pryor, MSM, NCG

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Rebecca M. Pryor, MSM, NCG (Becky) has worked as a nonprofit chief executive, lobbyist, advocate and community volunteer in the areas of child advocacy and adult guardianship for the past 48 years. She was the founder of Indiana Advocates for Children and spearheaded the initiative to develop the Court Appointed Special Advocate Programs in Indiana. For the past decade, she has been a leader in the development of the Indiana court approved volunteer guardian initiatives for incapacitated adults and seniors and is the volunteer staff for the WINGS / Indiana Adult Guardianship Services State Task Force.

Mrs. Pryor is the President of Creative Approaches LTD, an adult guardianship and case management services firm that specializes in cases involving family conflict. She has been the recipient of numerous awards and honors including the State of Indiana's highest award, the Sagamore of the Wabash, and the distinguished Indiana Commission for Women's Torchbearer for Women Award. She holds a Masters Degree in Business Management and is a National Certified Guardian, Certified Family Law Mediator, Certified Court Appointed Special Advocate, and Certified Volunteer Advocate for Seniors and Incapacitated Adults.

Tracy S. Regli

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Tracy S. Regli is a founding partner of Acuña ❖ Regli. Tracy focuses her practice on probate and trust administration, fiduciary representation, conservatorship and special needs planning. She has assisted many banks, fiduciaries, and family members with administering large and small estates throughout California. Prior to starting the firm, Tracy worked for a national real estate investment trust, negotiating and drafting commercial real estate transactions. Her extensive business experience makes her a more effective lawyer when administering estates and negotiating disputes for her clients.

Tracy is an active member of the Alameda and Contra Costa Bar associations, the Professional Fiduciary Association of California (PFAC), and the Southern Alameda Estate Planning Council. She is a sought-after speaker and has spoken at PFAC and Estate Planning Council meetings and conventions. Her pro bono activities include participating in the Lawyers

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Ira Salzman

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Ira Salzman is a partner in the law firm of Goldfarb Abrandt Salzman & Kutzin LLP. Ira is the former Chair of the Elder Law Committee of the New York County Lawyers' Association. He is currently a member of the Executive Committee of the Elder Law Section of the New York State Bar Association and the co-chair of its Legislation Committee. He is the former co-chair of its Medicaid Committee and former vice-chair of its Guardianship subcommittee.

Ira is a Fellow of the Brookdale Center on Aging. He is a member of the National Academy of Elder Law Attorneys and a former editor of its quarterly journal. He has written articles for the quarterly journal of the National Academy of Elder Law Attorneys, the Elder Law News (a publication of Little, Brown & Company), and for the Elder Law Attorney (published by the Elder Law Section of the New York State Bar Association). He is the co-author of the Guardianship Section of the New York Lawyer's Form Book (published by the New York State Bar Association). He is the author of the chapter on the responsibilities of the attorney for an alleged incapacitated person in Guardianship Practice In New York (published by the New York State Bar Association).

Ira has lectured at numerous Office of Court Administration certified training programs for Court Evaluators and Guardians in New York County and Bronx County. In 1999 he received the Leonard Lerner Award for pro bono service from the New York County Lawyers' Association. In 2012 he received an award from the Elder Law Section of the New York State Bar Association in recognition of his work drafting a New York version of the Uniform Adult Guardianship and Protective proceedings Jurisdiction Act.

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Anne Sansevero is the founder and CEO of HealthSense LLC, an Aging Life Care™ management consulting practice and co-founder of Holistic HomeCare Associates a concierge home care employment agency. She is a master's prepared geriatric nurse practitioner and a seasoned nursing professional with over 30 years of experience in the field. Anne has a sub-specialty in neurological disorders and has expertise with communication disorders relating to stroke and dementia. She speaks locally and nationally on aging related topics and has developed a number of innovative nursing assessment tools and standards to improve the nursing care for frail elders. Anne is a certified nurse care manager and serves on the local and national boards of the Aging Life Care Association® (ALCA) and is a Fellow of the Aging Life Care Leadership Academy. Anne is also a member of the American Academy of Nurse Practitioners and the Nurse Practitioners of New York.

David Seaton

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David Seaton has worked with adults with cognitive disabilities for more than 35 years. In 2002, David started LiveOak Living Community in San Marcos, Texas, with the vision of creating a supportive community where individuals with long-term cognitive disabilities can live a normalized, fulfilling life with friends and continued opportunities to grow...an approach and philosophy he calls "LifeLong Living".

David has also been the President of the Seaton Foundation, since 1986, which provides education and training programs that promote the concepts of LifeLong Living for professionals and organizations working in long-term care. The Seaton Foundation recently created the Learning Community for Cognitive Disability at Texas State University to attract, train, and provides internships for future leaders in long-term care. In addition, the Seaton Foundation has developed the Texas Alliance for Direct Support Professionals to improve the quality of long-term care delivered in Texas.

He has presented extensively across North America on long-term quality of life issues. He was recently chosen by Craig Hospital as the recipient of the prestigious John S. Young MD Lectureship Speaker, and the American Alliance for Intellectual and Developmental Disabilities - Knowledge Award for Excellence in Education & Research. David has also written extensively on lifelong living topics and served on numerous non-profit disability boards.

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Dr. Macie P. Smith is an award-winning Social Work educator in the health and human services sector. She is a Licensed Social Worker, Certified Social Work Case Manager, Social Worker in Gerontology and a Court Appointed Guardian with more than 18 years of experience working with aging and vulnerable populations. She serves as an Adjunct Faculty at the University of South Carolina and the University of Phoenix and a Subject Matter Expert in the College of Social Sciences. Dr. Smith is a published author and has appeared in several editions of Faculty Matters Magazine for her continued contributions in the academic areas of teaching, discovery, integration, and application. She also conducts research, develops programs, conducts program evaluations, and facilitates professional development training in the areas of health care management and human services program development. Dr. Smith has developed education programs for state and federal entities, non-profit organizations, and colleges and universities. She maintains a focus on coordinating quality care within aging and underserved communities through education, training, and professional geriatric care management.

Lisa Soloway, CLPF

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Lisa is a California Licensed Professional Fiduciary with the State of California Professional Fiduciaries Bureau. Ms. Soloway has been administrating trusts, estates and Conservatorships for over a decade. The Contra Costa court regularly appoints Ms. Soloway to resolve contentious family matters and provide complex trust analyses and accountings.

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Kathy Sorenson holds a Master of Business Administration degree from Pepperdine University and is a licensed insurance broker in California, Arizona, Nevada, Washington, Texas and Hawaii. An insurance specialist and resource for 59 Public Administrator/Public Guardian/Public Conservator offices, 330 Professional Fiduciaries and 45 law offices, Kathy draws from her 30 years of business and insurance experience to offer sound advice in the matter of property and liability insurance, specific to the unique requirements and needs of these professionals. Approaching insurance from a fiduciary perspective, Kathy offers an opportunity to address interesting challenges and share best practices.

Brenda Starr-Jude, NCG

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Brenda previously worked for a nonprofit volunteer-based guardianship program for just short of 9 years, serving clients 55 and over. She resigned from there, and the local probate judge asked her about starting a new nonprofit guardianship program, serving clients 21 and older. She made the decision not to tell the Judge no...and became a 501C3 in November of 2016. She has been a National Certified Guardian since September of 2008.

Brenda is a past Vice President and Advisor to the Ohio Guardianship Association and remains active in the OGA. She has served on the OGA annual conference committee since 2008 and was a Conference Chair of the annual OGA conference in September of 2014. She was honored with the OGA Annual Distinguished Service Award at this conference.

Brenda is a member of the NGA and served on the site selection task force for the 2019 conference. At the NGA conference in October 2017, she was recognized with the National Certified Guardianship Excellence Award, one of the highest honors bestowed by the CGC. This award recognizes the person's exemplary work as a CGC National Certified Guardian.

Melissa (Missy) Tackett, NCG

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Missy graduated from Ball State University in 1993 with a Bachelor's Degree in Business Administration. After college, she began her career as the Business Manager at the Bedford, IN Public Library. Once her first child, Carlee Deann, arrived she was able to stay home and begin many new endeavors.

In 2007 Missy continued her career in non-profits and entered the workforce as the Financial Controller for The Solutions Center (TSC) in Mitchell, IN where she has spent the last 11 years advocating for Independent Living and Guardianship clients. She is currently the Director of Finance & Program Development for the agency, as well as Director of Southern IN Guardianship & Payee Services, two of the programs offered by TSC. Missy earned her status as a Nationally Certified Guardian in 2016 through the Center for Guardianship Certification and currently oversees a Volunteer Advocates for Senior Incapacitated Adults (VASIA) program with 3 employees, 15 volunteers, and 50 clients.

Missy has much passion for non-profits and it shows as she has volunteered on the Board of Directors for Lawrence Inter-Faith Endeavor (L.I.F.E), the local food pantry, and for the local Boys and Girls Club in her county. She is also over the Greeting Ministry at her church after previously holding the position of Children's Nursery Director.

Jeff Thompson

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Jeff has served as Regional Sales Manager for The Bar Plan since 2007, and has over 30 years of professional sales experience. One of his primary responsibilities is court related surety bonds with an emphasis on probate bonds, including guardian and conservator bonds. Jeff frequently represents The Bar Plan at professional legal conferences focused on probate and estate planning law. Jeff serves on the Missouri Bar Annual Solo and Small Firm Conference Planning Committee and is an experienced public speaker.

Jeff is a graduate of Southeast Missouri State University in Cape Girardeau, Missouri where he obtained his Bachelor of Science degree in Marketing, Management and Psychology.

Jill Tilbury, CBIS

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Jill Tilbury works as a Public Guardianship Administrator at the Minnesota Department of Human Services in the disability services division.

Jill has worked in the social service field for 20 years, and has been in her current position for the past three years, working with public guardianship for the state of Minnesota. Jill is a part of the steering committee for WINGS MN which is a group of stakeholders for a national movement for improving guardianship and conservatorship practices, supported by grant funding from the National Guardianship Network. Jill is a member of the Minnesota Association for Guardianship and Conservatorship (MAGiC) and the National Guardianship Association. Jill is a private guardian in her personal life for an individual who was previously under public guardianship. Jill is passionate about providing advocacy to and for people with disabilities.

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Dr. Weisblatt received his medical degree from SUNY Downstate and completed his residency in Psychiatry at Albert Einstein College of Medicine. He served for fifteen years on the psychiatric teaching faculty at Einstein and for eight years on the faculty at SUNY Downstate. He is boarded in General and Geriatric Psychiatry and served on the Consultation Liaison Service, consulting on elderly medical and surgical patients while at Einstein.

He has spoken widely on the topic of accurate diagnosis and effective treatments especially in complicated patients with mood disorders. He is an active member of the International Society for Bipolar Disorders and a Fellow of the American Psychiatric Association. He originated and authored the "Clinician's Corner" column in Bipolar Magazine and has served as an expert consultant to the federal government in both the U.S. and Canada as well as state and local governments and healthcare organizations throughout North America. He has offices in Stamford, CT and Pocono Lake, PA and is licensed and serves patients in New York, Connecticut, Pennsylvania and Florida.

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Morgan K. Whitlatch is the Lead Project Director of the National Resource Center for Supported Decision-Making (NRC-SDM), which is an initiative funded by the Administration for Community Living of the U.S. Department of Health and Human Services. She also serves as the Legal Director of Quality Trust for Individuals with Disabilities, an independent, non-profit advocacy organization in D.C. that has been advancing the interests of people with intellectual and developmental disabilities since 2001. Prior to joining Quality Trust in 2009, she was an attorney at the Rhode Island Disability Law Center, which is the state's protection and advocacy system for people with disabilities

Ms. Whitlatch has devoted her legal career to working and on behalf of people with disabilities in legal matters involving guardianship and alternatives, capacity, and the right to self-determination; community integration; living life free from abuse and neglect; and accessing public benefits and services. She also serves as a member of the D.C. Superior Court Probate Fiduciary Panel. In addition to providing direct legal services, Ms. Whitlatch has extensive experience in implementing systemic policy, practice, and training initiatives, including those of NRC-SDM and the Jenny Hatch Justice Project (JHJP), which are dedicated to advancing the "Right to Make Choices" of people who live with disabilities and who are older. Notably, she co-represented the JHJP namesake in a trial in which Supported Decision-Making was recognized as an alternative to permanent and plenary guardianship.

Ms. Whitlatch graduated with honors from Georgetown University Law Center, and with honors, Phi Beta Kappa, from Wesleyan University. While in law school, she worked on disability-related policy and legislative issues by interning with former U.S. Senator Tom Harkin's Counsel on Disability Policy and participating in the Georgetown Federal Legislation Clinic, then led by Chai Feldblum, who is now a Commissioner of the U.S. Equal Employment Opportunity Commission. Ms. Whitlatch has been recognized by Georgetown University, Human Rights Action - Amnesty International, as making outstanding contributions through her work as a human rights practitioner, and she is a member of the Disability Rights Bar Association.