



**National Conference on Guardianship
October 12 – 15, 2019
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.

Brooke Allen

Judge, Probate Court No. 2 of Tarrant County, Texas
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Judge Brooke Allen was appointed by the Tarrant County Commissioners to serve as Judge of Probate Court No. 2 in October of 2016, and elected for a full term in 2018. In Texas, our Statutory Probate Courts hear decedent's estates, guardianship, mental health, and litigation touching these areas.

Previously, Allen litigated complex cases through Texas and in Federal court. Her experience as an attorney with trials in aviation, real estate, oil and gas, insurance defense, wrongful death, survival actions, family law and probate serve her well, as these are all areas which touch Probate Court No. 2. Allen also managed the title company for her former law firm providing her the knowledge to ensure the transfer of title in decedent's estate matters.

Since taking the bench, Allen appointed a full-time Public Probate Administrator, the only one in the State of Texas. The PPA's main goal is to assist citizens of Tarrant County in recovering funds of decedent's with small estates to reimburse citizens and taxpayers for costs incurred by the decedent. To date, the PPA has recovered more than \$150,000 for the taxpayers of Tarrant County, \$300,000 for private citizens and had an impact in bringing back more than a million dollars to the County.

As an attorney, Allen was frequently recognized by her peers for her dedication to the law and hard work. Allen is a Fellow with the Texas Bar Foundation, an honor bestowed only 1/3 of 1% of Texas attorneys each year, was consistently voted a "Top Attorney" by Fort Worth Magazine, a "Texas Rising Star" in Texas Monthly, and was named "Attorney of the Year" by the Fort Worth Paralegal Association. She earned her law degree from Texas Wesleyan University School of Law *magna cum laude* and her bachelor's degree in International Business from Auburn University *cum laude*.

Sharon R. Bock, Esq.

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Clerk & Comptroller Sharon R. Bock is in her third four-year term. As Clerk & Comptroller, she serves a local population of more than 1.3 million citizens as the County's Chief Financial Officer, Treasurer and Auditor, Clerk of the Circuit Court, County Recorder and Clerk of the Board of County Commissioners. Hers is the third largest Clerk's office in Florida, administering a \$78 million annual budget and overseeing more than 750 employees in seven locations.

Among Clerk Bock's most important duties as Clerk & Comptroller is identifying fraud, waste and government inefficiencies through her state-accredited Division of Inspector General. Under Clerk Bock's leadership, the Division of Inspector General launched its Guardianship Fraud Hotline in 2011. With guardianship cases growing as a result of Palm Beach County's aging population, Clerk Bock recognized the importance of monitoring the County's 2,800 guardianship cases and their estimated \$500 million in assets.

To date, Clerk Bock's guardianship fraud investigations have uncovered more than \$5.1 million in missing or misappropriated assets. Our guardianship program has been upheld as a model at the World Congress on Adult Guardianship and at the National Guardianship Association conferences, and has been replicated throughout the State of Florida.

Clerk Bock's work with several statewide committees and her election as Chair for the Clerks of Court Operations Corporation allowed her to build relationships with state leaders on important issues such as guardianship. A bill modeled after Clerk Bock's guardianship program became the only guardianship related legislation to pass during the 2014 Legislative Session. Passing with unanimous approval, it empowered all Florida Clerks to perform enhanced audit investigations and more effectively combat guardianship fraud. Florida is now among the top states in protecting the assets of guardianship wards.

The important work of Clerk Bock's guardianship program has been featured in the *American Bar Association Bifocal Journal*, the *Palm Beach Post*, the *South Florida Sun-Sentinel*, the *Miami New Times*, as well as on local broadcast stations. Clerk Bock continues to advocate for the elderly population, is constantly evaluating new methods to improve and build on all Clerks' fiduciary duties and responsibilities as it pertains to guardianship.

Sue Bronson, LCSW

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Sue Bronson, LCSW is the Co-Chair of the ACR Elder Justice Initiative on Eldercaring Coordination. Sue is a mediator and recently retired psychotherapist in private practice since 1982, teaching mediation at the University of Wisconsin-Milwaukee School of Continuing Education and teaching Eldercaring Coordinators nationwide. Sue currently serves as a subcommittee Chair of the American Bar Association Section on Dispute Resolution Task Force on Elder Abuse Screening for Mediators which is developing an elder abuse screening tool specifically for neutrals. She has served on the Board of the Academy of Family Mediators (now Association for Conflict Resolution -ACR), was the Chair of the ACR Family Section, Co-Chair of the ACR Elder Section, and served many years on ACR (and former AFM) training and quality assurance committees.

Lennie Burke, NCG

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Lennie Burke is a professional guardian with 16 years' experience and is nationally certified. His practice specializes in high conflict cases. He is formerly the Executive Director of the Florida State Guardianship Association. He now serves on

its Board and is President of the Central Florida chapter. He has been an advocate for professionalism in guardianship for many years and was a contributor to the recently adopted Standards of Practice for Florida Guardians.

He also practices in elder mediation and is trained in guardianship mediation. He is certified by the Supreme Court of Florida for County Court and Family mediation. He formerly served on the Board of directors of the Florida Academy of Professional Mediators. He is also trained in Christian Conciliation.

Laura N. Butler, MRC

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Laura Smith Butler has a BA in Healthcare Administration from Midway College and an MRC from the University of Kentucky. She has worked with people with disabilities in various capacities for over 25 years. Currently, she works at the University of Kentucky Human Development Institute. There she is involved with three projects- the National Core Indicators, Supported Decision-Making, and the Quality of Life survey project.

Daryl J. Cady

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Daryl Cady is the CEO of Hospice Southern Maine, Scarborough, Maine, a \$16M hospice agency. She joined the organization in September 2014. Prior to HSM, she was the CFO with Home Health & Hospice Care, an \$18M home care, palliative & hospice provider in Merrimack, NH. Including all financial responsibilities, she was also responsible for all areas of the organization's management, including assisting the agency during their CEO transition. Although not a clinician herself, Daryl has a thorough understanding of hospice, Medicare regulations and has developed a strong clinical acumen.

Previously, Daryl had a very successful business career, and has a broad understanding of all aspects of business, financial oversight and compliance at all levels. Even when in the business world, she had a passion for healthcare, serving on numerous healthcare and other boards and committees. Daryl was involved with the NH Home Care Association, Catholic Medical Center and the CMC Physician Practices Association, the Granite State Legislative Committee, the New London Hospital, the Headrest Crisis Center and Homeless Shelter, VNA Health Systems of Northern New England, Ausbon Sargent Land Trust, Currier Museum of Art, Palace Theatre, Maine Hospice Council, and a past President of Rotary. She currently sits on the Maine Home Care and Hospice Alliance.

Debbie Coleman

Nurse Area Manager for Central Florida, The Florida Institute for Neurologic Rehabilitation
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Debbie Coleman has been a resident of Central Florida area since Childhood. She has been a practicing Psychiatric Nurse for greater than 25 years. She presently is the Area Manager for The Florida Institute for Neurologic Rehabilitation, where she does Clinical, Psychological and Neurological Evaluations on Potential Referrals. Debbie works closely with Families, and Client who have experienced a "Brain Injury" to find them, support, Comfort and the Best Quality of Care

Camille Collins, M.P.H.

Federal Program Coordinator, Kentucky Protection & Advocacy
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Camille has promoted and protected the rights of people with disabilities for over 15 years while working for Kentucky Protection & Advocacy. In addition, she has worked for people with disabilities for over 23 years. She graduated from the University of Kentucky with a bachelor's degree in Psychology and a M.P.H.

Sherry Culp, CSW

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Sherry Culp is the Kentucky State Long Term Care Ombudsman. Sherry administers the Kentucky State Long Term Care Ombudsman Program from the Nursing Home Ombudsman Agency of the Bluegrass, Inc. (NHOA) a freestanding nonprofit agency located in Lexington, Kentucky that focuses on improving care for residents of long term care facilities through services provided by the Long Term Care Ombudsman Program.

Sherry works with 15 local District Ombudsman Programs, consumers and other advocates to promote quality care. Sherry provides training and coaching to ombudsmen and educates the public about problems residents experience and how to resolve them.

Sherry began as a volunteer ombudsman at the Nursing Home Ombudsman Agency in 1996 and became the agency's Director of Program and Services in 1999. In 2009 Sherry became the Executive Director of the agency and the local Bluegrass District Ombudsman. Sherry recruited, trained, and managed 30 certified ombudsman staff and numerous volunteers while leading the local program.

Sherry has a Master's degree in social work (MSW) from the University of Kentucky. She was a Leader on the council of The National Consumer Voice for Quality Long Term Care in Washington, DC, an officer of the National Association of Local Long Term Care Ombudsmen and mentor for many new ombudsmen. Sherry has given hundreds of presentations and provided training across the country to ombudsmen, nurses, social workers, the general public, as well as residents and their families on topics ranging from navigating the long-term care system to abuse prevention.

Megan L. Dolbin-MacNab, PhD, LMFT

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Megan L. Dolbin---MacNab, PhD, LMFT is Associate Professor of Human Development and Family Science and a faculty affiliate of the Center for Gerontology at Virginia Tech. She is also the Director of Virginia Tech's Marriage and Family Therapy Doctoral Program. As a licensed marriage and family therapist, Dr. Dolbin---MacNab has experience working with high conflict couples and families. She is also an expert in family gerontology, family intervention, and family processes; her research focuses on families in which grandparents are raising their grandchildren. Dr. Dolbin---MacNab has been involved in the development, implementation, and empirical evaluation of a variety of community---based interventions and programs. She is the author of numerous journal articles and book chapters, as well as a variety of resources for practitioners, and also consults with local and state agencies and support programs about delivering effective services to aging families.

Erin Droll, BA, NCG

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Erin has a Bachelor's degree in Interdisciplinary Studies: Aging Studies from the University of Iowa and has done Master's level course work at Iowa State in Family Financial Planning and Gerontology. Erin's past work experience includes the Elder Abuse Intervention Program, 7 years as a corneal recovery technician with the Iowa Lions Eye Bank, 5 years as a

nurse's aide/direct care staff/medical assistant, and 1 year as a consumer credit counselor.. Erin formerly volunteered her time with the Senior Health Insurance Information Program (SHIIP), and is well versed in Medicare, Medicaid, and long term care insurance. Her 24 years of experience includes working with health care delivery systems, subsidized housing, and nursing homes. Erin has been a professional fiduciary with her own practice since 2013.

Yolande P. Erickson, Esq.

Conservatorship Attorney, Bet Tzedek Legal Services
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Yolande Erickson advocates for clients seeking elder abuse restraining orders and general, limited, Alzheimer/dementia and small estate conservatorships. Ms. Erickson's outreach efforts include the January 2007 opening of the self-litigant conservatorship and elder abuse restraining order clinic, in partnership with the Los Angeles Superior Court; the Family Matters project, providing limited conservatorships for students at special needs schools and the Transitions project. Transitions seeks to identify and respond to the legal and social issues of the aging Intellectual/Developmentally Disabled population through the creation of a coalition of both professionals and stakeholders. Erickson has represented Bet Tzedek nationally and internationally in Israel, Germany, Japan, Australia, Korea and Canada. A member of Bet Tzedek's caregiver team, she received her B.A. from Swarthmore College and her J.D. from Southwestern Law School.

Helen J. Ferraro-Zaffram

Managing Attorney, Center for Elder Law & Justice
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Helen is a Managing Attorney at The Center for Elder Law & Justice, where she handles Article 81 Guardianship matters and health related issues. Helen graduated from Canisius College in Buffalo, New York where she received her B.A. degree in Political Science and Sociology. She received her J.D. from St. Louis University, St. Louis, Missouri. She serves as a Community Liaison on the Ethics Committee of the Erie County Medical Center Corporation and has been a member of the Health Law Committee of the Medical Society of Erie County for a number of years.

Helen served on the Board of the National Guardianship Association and was co-chair of the Education Committee of that organization.

She has received the Service Award from the Bar Association in the past. She received a Women in the Law Award in 2005 presented by the 8th Judicial District Gender & Racial Fairness Committees and she was the 2012 recipient of the Dr. Evan Calkins Meritorious Service Award presented by the Network in Aging of Western New York, Inc. She was named Lawyer of the Year by the Erie County Bar Association in 2013.

Steven D. Fields, JD

Court Administrator, Senior Attorney, Tarrant County Probate Court Two
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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, teaching Guardianship and Estate Administration classes, and currently serves on the board of the Texas Guardianship Association. He is the past president of the National Guardianship Association (2008); past president of the Texas Guardianship Association (2004-2005); past chair for the Texas Senior Advocacy Coalition (2006-07); and was the first HHSC Texas Guardianship Director (1998-1999). He served for almost five years as Court Investigator for the Tarrant County Probate Courts (1993-1998) 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, has a 17-year-old daughter, and is an avid collector of musical recordings.

Linda Fieldstone, M.Ed.

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Linda Fieldstone, M.Ed., former Supervisor of Family Court Services, worked for the 11th Judicial Circuit, Florida, Miami-Dade County, Florida for 26 years. Her leadership roles include past President of the Association of Family and Conciliation Courts (AFCC); past President of its Florida Chapter (FLAFCC); Secretary of the AFCC Task Force on Parenting Coordination 2005 and recorder for the current Task Force to update standards; and the Florida Supreme Court Rules and Policies Committee. She is a Florida Qualified Parenting Coordinator and Neutral Facilitator in Collaborative Practice participating in a Pro Bono Project for the 11th Judicial Circuit. Ms. Fieldstone is involved in research, training, and consultation in the U.S and internationally and has written articles on high conflict families, family court services, empirically based parenting plans and parenting coordination and eldercaring coordination. Ms. Fieldstone was honored with the Florida Supreme Court Sharon Press Excellence in ADR Award, in honor of visionary leadership, professional integrity and unwavering devotion to the field of alternative dispute resolution. In 2018, she was spotlighted by the International Federation on Ageing and invited to speak to the United Nations on eldercaring coordination in honor of World Abuse Awareness Day 2018. Ms. Fieldstone is currently Co-Chair of the ACR and FLAFCC Elder Justice Initiatives on Eldercaring Coordination and servicing the community through Family Resolutions, LLC, to provide conflict resolution opportunities directly to families of all ages before, during or after court actions.

Deborah Liss Fins, LICSW, CMC

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Deborah Liss Fins is the Director of JHC LifeCare Management, a new division of the Jewish Healthcare Center formed in 2019 with the acquisition of Deborah Fins Associates, PC (an Aging Life Care™ management practice founded in 1995). She is a licensed independent clinical social worker and certified care manager. Debbie has lectured extensively in the areas of care options for elders, financing of care, planning for aging parents, caregiver stresses, and guardianship and related matters. She is a member of the Aging Life Care® Association and its New England chapter. She has served on the National Board of ALCA since 2014, chairs its Standards Committee, and was a recipient of its President's Award in 2018 for service to the organization. She is also a member of the National Association of Social Workers, Massachusetts Guardianship Association, the Worcester Area Geriatric Social Workers (WAGS), the Worcester Alzheimer's Partnership, and Worcester Elder Networking Group (WENG).

Debbie was the director of the Jewish Family Service of Worcester's Guardianship Program for 16 years. This was the first corporate guardianship program in Massachusetts and served as a model for subsequent programs. The program was awarded a Robert Wood Johnson grant in 1989 to create a model for medical decision making for incapacitate elders. As a result of the grant, JFS published one of the first manuals for guardianship programs and an article on decision making. Debbie is an "Elite Feet" individual fundraiser for the Central Mass. Walk to End Alzheimer's. Debbie is a graduate of Brandeis University and the Columbia University School of Social Work.

Douglas N. Godshall, Esq.

Mediator, Stark County Ohio Probate Court
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Douglas N. Godshall is a Mediator and Arbitrator in Ohio, West Virginia, and Pennsylvania. He served as a civil jury trial lawyer for over 35 years before turning his practice to exclusively serving as a neutral. He has served as a court appointed mediator in several Ohio Probate Courts, including the Stark County Ohio Probate Court, where he has assisted Judge Dixie Park in installing an Eldercaring Coordination program.

Scott Greenberg, CAEd

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Scott Greenberg is currently CEO of ComForCare Senior Services, a private-duty, non-medical home healthcare agency serving Palm Beach, Martin, St. Lucie and Indian River counties. Scott serves on the board of the National Guardianship Association and is Past President and a current board member of the Florida State Guardianship Association. He is also on the Advisory Council for the Area Agency on Aging. He has served on Alzheimer's Community Care's special goodwill task force, and is a former AmeriCorp volunteer. He also developed the Lifespan Education and Resource Network speaker series and developed a second speaker series dedicated to family caregivers. Scott has written an award-winning book entitled "Oh My God, I'm Getting Older and So is My Mom" and hosts a weekly radio show on True Oldies 95.9FM/106.9FM with the same title. Scott received his National Certified Alzheimer's Educator designation from the National Certification Board for Alzheimer Care in July 2014.

Paul R. Greenwood

Retired Deputy District Attorney
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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.

Terry W. Hammond, JD, NCG

Executive Director, Texas Guardianship Association
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Terry W. Hammond, J.D., is the Executive Director of the Texas Guardianship Association, and is the Guardianship and Probate attorney for the Brazos County Courts at Law in Bryan, Texas. Mr. Hammond is a past president of the Texas Guardianship Association and the National Guardianship Association, and was Executive Director of NGA from 2006-2010. Mr. Hammond earned his Bachelor of Science Degree in Education and his Master of Arts Degree in History from Texas A&M University in 1979 and 1986, respectively, and his Juris Doctorate from the Texas Tech University School of Law in 1989.

Michael Handy, AS, 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. This program acts as guardian and/or conservator for more than 4,500 wards of the state. In 2008, he became the 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 seven 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 ten years of experience working in the financial industry and more than 30 years of experience in social services.

Bertha S. Hayden, Esq.

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Bertha S. Hayden is an elder law attorney with Bet Tzedek Legal Services who exclusively works in matters involving intellectually disabled adults and their caregivers. In 2009, she launched an innovative pilot program, Family Matters, in Los Angeles County to educate and provide direct legal services to families with special education students on limited conservatorships (adult guardianship) and supported decision-making options. Bertha has received the Award of Merit from Legal Aid Association of California and the Jack H. Skirball award for the Family Matters Project. Bertha received her B.A. from Santa Clara University, and earned her J.D. from Whittier Law School.

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.

Jodi Holsclaw, MSW

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Jodi Holsclaw is Kentucky's Eastern Regional Long-Term Care Ombudsman at the Nursing Home Ombudsman Agency of the Bluegrass (NHOA). NHOA is a free standing, non-profit agency located in Lexington, Kentucky that focuses on improving care for residents of long-term care facilities through services provided by the Long-Term Care Ombudsman Program. Jodi provides technical assistance and training to District Ombudsmen, their staff, and volunteers. Jodi is a local contract specialist in the State Long-Term Care Ombudsman Program and has worked along the national advocacy group for residents in long-term care, The Consumer Voice, to launch an initiative with 8 other States to help prevent catheter acquired urinary tract infections (CAUTIs). In 2013, Jodi managed a retirement home for women. Jodi has a bachelor's in psychology from Transylvania University and a Master's in Social Work from the University of Kentucky.

Sally Balch Hurme, JD

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Sally Hurme is an elder law attorney who retired from AARP after 23 years. While at AARP she worked on a wide variety of issues including advance care planning, surrogate decision making, consumer fraud, elder abuse, and financial security.

As chair of the National Guardianship Network she led the planning for the 2011 Third National Guardianship Summit. Hurme was the convener of the 3rd World Congress on Guardianship held in Washington, DC in 2014. She was an advisor to the Uniform Law Commission in the drafting of the uniform guardianship jurisdiction act and Uniform Guardianship, Conservatorship, and Other Protective Arrangements Act. Hurme also was a member of the U.S. State Department delegation that drafted the Hague International Convention on the Protection of Adults. She was honored by the National College of Probate Judges with the Treat Award for excellence in probate law.

Ms. Hurme is the author of the award-winning *ABA/AARP Checklist series: Checklist for My Family, Checklist for Family Caregivers, Checklist for Family Survivors, and Get the Most Out of Retirement*. Each is a practical guide to the legal matters encountered by individuals in retirement, their caregivers, and their families after death.

She received her law degree *cum laude* from the Washington College of Law at American University, Washington, DC and her bachelor's degree from Newcomb College, Tulane University, New Orleans, LA. Hurme has served multiple terms on the boards of the National Guardianship Association and the Center for Guardianship Certification. She's a member of the Virginia Bar Association, American Bar Association, and the National Academy of Elder Law Attorneys.

Gregory A. Jicha, MD, PhD

Professor of Neurology, The Robert T. & Nyles Y. McCowan Chair in Alzheimer's Research
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Dr. Jicha is a Professor and Vice Chair for Academic Affairs in the Department of Neurology and Sanders-Brown Center on Aging at the University of Kentucky (UK). Dr. Jicha holds the Robert T & Nyles Y McCowan Endowed Chair in Alzheimer's Research at UK. Dr Jicha serves as an Associate Center Director and leads the Clinical Core of the UK , NIA-funded Alzheimer's Disease Center. He also serves as the Medical Director of KY Telecare and directs the Telemedicine Cognitive Clinic at UK, designed to reach out to rural populations across KY for both clinical and research-related activities in the area of AD and related disorders. He is the principle investigator at UK for the National Alzheimer's Disease Cooperative Study (ADCS) Group, the Alzheimer's Clinical Trial Consortium (ACTC), serves on the Clinical Task Force and Steering Committee for the National Institute of Aging Alzheimer's Disease Center Program, and also serves as the immediate past Chair of the American Academy of Neurology Geriatric section, and as the current Chair for the International Alzheimer's Association Clinical Trials Advancement and Methodology Professional Interest Group. His current research interests lie in the areas of preclinical disease states, mild cognitive impairment, vascular contributions to dementia, and clinical trials of disease modifying therapies for degenerative dementias.

Specific to this presentation, he serves as the Vice-Chair for the UK IRB, and co-wrote the decisional capacity guidelines for the UK IRB. He also serves on the ethics committees for both the National Alzheimer's Disease Cooperative Study (ADCS) Group, and the NIH-funded Alzheimer's Clinical Trial Consortium (ACTC).

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.

Bradley Loliger, Esq.

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Brad is a Staff Attorney at the Center for Elder Law & Justice (CELJ), a not-for-profit legal services agency in Buffalo, New York. He graduated from the University at Buffalo with a B.A. in Psychology, and a B.A. in Health & Human Services in 2009. He received his Masters in Social Work from the University at Buffalo in 2012 and received his Juris Doctor from the University at Buffalo in 2013.

Brad works in the Article 81 Guardianship Unit at CEU, working with a team of attorneys, paralegals, and social workers as Guardian of the Person and Property for nearly one hundred individuals whom require Guardianship services.

Brad is a member of the Erie County Bar Association and the New York State Bar Association. He regularly presents on Guardianship and Elder Law issues to various groups in the Western New York region.

Eric Mayfield, MA, NCG, CLPF

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Mr. Mayfield is the founder of two distinctly different California companies in Information Technology (1997) and Fiduciary Management Services (2006). He is a National Certified Guardian working in Orange County, California and New Brunswick, Canada. In establishing his business, Konsulati, he set out to ensure he could track client and vendor interactions. Though he writes some code, he leverages applications out of the box, including VoIP, online backup, Google Photos, a contact management system, eDocuments and custom email servers to run his solo practice from his office and from his smartphone.

Robert L. McClelland, LLM, CELA

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Robert L. McClelland was the first elected Chair of the Kentucky Bar Association's Elder Law Section and is one of two Kentucky attorneys certified in Elder Law by the National Elder Law Foundation, the only agency approved by the American Bar Association to certify in Elder Law.

Mr. McClelland is a 1972 graduate of the University of Charleston, a 1983 graduate of Salmon P. Chase College of Law and Northern Kentucky University and in 2013 was awarded a Master of Laws degree (LLM) in Elder Law from The Stetson University College of Law.

He is personally a court appointed guardian and "special needs" Trustee in multiple cases for aged or special needs clients. His firm serves as Trustee for the Kentucky Guardianship Association, Inc.'s Public and Private Pooled Special Needs Trust, which have in excess of 300 accounts and as Trustee of 32 individual special needs trusts.

Robert has been published repeatedly on issues familiar to professionals with older clients; has often spoken about senior and special needs estate planning, including Medicaid planning, for the Kentucky Bar Association Annual Convention and regional Kentucky Law Update sessions. He is often called upon to give continuing legal education workshops on guardianship; Medicaid planning and special needs estate planning strategies to attorneys, social workers, nursing home and financial professionals.

Mr. McClelland serves on the National Public Policy Committee for the Special Needs Alliance, Inc. and is active in the KY Commission on WINGS. In addition to his service for the KBA Elder Law Section and the Kentucky Guardianship Association, Mr. McClelland has served an appointment as a member of the Lexington-Fayette Urban County Government's Commission on Senior Services. Among other associations, he is a member of the Elder Law Section of the Kentucky Bar Association; National Academy of Elder Law Attorneys, Inc.; the Special Needs Alliance, LLC; ElderCounsel, LLC; the Bluegrass Estate Planning Council and the Mid-South Estate Planning Forum.

Claire McDonnell

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Claire McDonnell is the Co-Founder and COO of True Link Financial, a national financial services firm committed to increasing the independence and financial well-being of adults with disabilities and older adults. In addition to being the payment card provider for ABLE account programs offered by 12 states, True Link serves tens of thousands of pooled and individual special needs trust beneficiaries and helps guardians across the country manage and protect clients' finances. Claire's experience in strategy, operations, and compliance ranges from management consulting for multi-billion dollar organizations to venture capital diligence to financial services operations. A founder of two venture-backed companies, Claire is also a frequent presenter on national panels on topics including customer-centered management, elder financial protection, and financial services innovation. She holds a BA from Columbia University and was trained in strategy by Bain & Company and financial compliance by the Banker's Academy. Additionally, Claire was a Fulbright Scholar and a Fellow at Y Combinator and Innovation Endeavors.

Teri McRae, NCG, MBA

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After 30 years in business and four years as Register of Probate for Cumberland County in Maine, I started McRae & Associates. Over the past 10 years, I have been involved with over 100 clients, each in different circumstances.

I have worked with clients in many capacities, including Power of Attorney, Trustee, Guardian, and/or Conservator. I also serve as Personal Representative of estates and Guardian Ad-Litem for court matters. Making and defending financial decisions is a big part of what I do. That being said, even the financial appointments are really about people more than money.

My Master's in Finance from MIT Sloan School and many years working in business provided excellent training in financial reporting. I've learned to provide correct and complete information and make reports that anticipate the real questions people will ask. There are always follow up questions. Good reports anticipate those questions and make sure that you are communicating the correct message.

I grew up in Denver, Colorado. I earned a Bachelor's in Economics at Brandeis University. After 15 years in the Boston area, I moved to Maine. I currently serve as Treasurer for the Board of the Center for Guardianship Certification. I am in my first year as a board member of the National Guardianship Association.

Joyce Meckna, CCM, CM

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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.

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. In addition to government and non-profit work, Arin operated a family law and probate practice in southern Indiana. After years of advocacy and guardianship practice, Arin was certified as a National Master Guardian in 2017. She currently serves on the Board of Directors for the National Guardianship Association, and the Florida State Guardianship Association Board, focusing on educational opportunities for guardians.

In addition to her legal background, Arin has worked with those dealing with homelessness, mental illness and unemployment. She also serves as a Court Appointed Special Advocate/Guardian Ad Litem. Arin has been trained as a forensic interviewer under the "Finding Words" methodology. She is currently employed at Mental Health Community Centers, Inc., a community mental health organization.

Anthony Palmieri, JD, CIG, CIA

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Anthony is the Deputy Inspector General and Chief Guardianship Investigator in the Clerk & Comptroller for Palm Beach County's accredited Division of Inspector General. He is a Certified Internal Auditor and holds a Certification in Control Self-Assessment from The International Institute of Internal Auditors and is a Certified Inspector General, Certified Inspector General Investigator, and Certified Inspector General Auditor from the Association of Inspectors General.

Anthony is a nationally-recognized expert and speaker on Silver Collar Crimes, guardianship monitoring, investigating, and fraud; and has been invited to testify as an expert to Nevada Supreme Court, the Tennessee Bar Association, The Florida Bar, and the Florida Attorney General's Office. He has been quoted frequently in many local and national publications such as the Wall Street Journal, the New Yorker, Daily Business Review, Palm Beach Post, Sun Sentinel, and the Las Vegas Journal Review.

He is a Board Member for the Florida State Guardianship Association and the National Guardianship Association. He was formerly appointed to the Foundation for Indigent Guardianships (FIG) Board of Directors, the National State Courts Association (NSCA) Guardianship Fraud Red Flags Expert Panel, the Florida House of Representatives Guardianship Workgroup, and the White House Conference on Aging. He was recently appointed to the Florida Working Interdisciplinary Network of Guardianship Stakeholders (WINGS) by the Chief Justice of the Florida Supreme Court.

Anthony is the director for the Clerk's Guardianship Fraud Program; the Clerk's program won the 2014 National Adult Protective Services Association (NAPSA) "Joanne Otto Distinguished Service Award", the 2015 Family Caregiver Alliance "Gilbert Innovations in Alzheimer's Disease Caregiving Legacy Award for Public Policy", and the 2016 Florida Council on Aging "Service to Seniors by an Organization Award". In September 2016, Anthony represented the Clerk's office in Berlin, Germany by winning the 4th World Congress on Adult Guardianship "Best Practice Model" competition. The Clerk's office was one of nine international winners and the only winner representing the United States. He spoke at the 5th World Congress on Adult Guardianship about guardianship monitoring in Seoul, South Korea in 2018.

Anthony serves as the Administrative Coordinator for the Clerks' Statewide Investigations Alliance, providing statewide investigative services for the Florida Department of Elder Affairs, Office of Public and Professional Guardians.

The Hon. Dixie Park

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The Honorable Dixie Park is the first woman elected Judge of the Stark County Probate Court. She has served in this capacity since January, 2004.

Judge Park is the President of the Ohio Association of Probate Judges. She is a member of the Ohio Judicial Conference Executive Committee, the National College of Probate Judges, Ohio State Bar Association and Stark County Bar Association. Judge Park also chairs the Probate Forms Committee.

Judge Park chairs the Subcommittee on Adult Guardianship of the Advisory Committee on Children and Families of the Ohio Supreme Court. In 2016, the Stark County Probate Court received a Grant from the Administration for Community Living to fund the expansion of its Court Angel Program. Grant funds have also been used to develop and implement an Eldercaring Mediation Program to assist elders and their families in resolving differences in high-conflict situations, focusing on the needs of the elder to prevent abuse and avoid guardianship.

Alice Paxton, NCG, CSA

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Alice Paxton is the Owner and Managing Director of Paladin Life Care (formerly, IKOR of the Greater DC Area). Paladin Life Care provides organizational, financial, legal, and medical advocacy for seniors, the disabled, and those with special needs. IKOR partners with professionals and loved ones to help clients live independently with dignity and have attentive, family-like care so they can live their best life now.

As a military spouse of 32 years, Alice volunteered untold hours to develop the Family Readiness Support Group for 5th Group Special Forces and train Commanders and their representatives with the 101st Airborne at Ft. Campbell, Kentucky. She has also worked as a substitute teacher at Department of Defense military schools at each command. Alice holds three industry distinctions as a National Certified Guardian (NCG), Certified Senior Advisor (CSA), and Program Management Professional (PMP). In 1996 she was bestowed the Commander's Award for Public Service, as well as being honored with a distinguished *Service Award* from the United States Army Special Operations Command. Before IKOR, Alice spent 15 years of Federal contract as an IT program manager. In 2010, the Department of Defense honored Alice with a *Certificate of Appreciation Citation from the Office of the Secretary of Defense*, for her "superior abilities through a multitude of areas dealing with program management" that included three primary projects with one being the Review of the Issues Associated with a Repeal of the Don't Ask, Don't Tell program, which "showed great intellect, judgment, analytical abilities, and devotion to duty that reflect distinct credit upon herself and the Department of Defense."

Alice is an active member of the community serving as a Commissioner for the Arlington County Board on the Long Term Care Residences Commission, and is a volunteer guardian for the Arlington Court Appointed Guardians & Personal Advocate Program. She holds memberships in the National Guardianship Association and serves on their Membership Board; she is a member of the McLean Estate Planning Council, and is a member of the Board. She is a founding member of Planning for Senior Life (PSL) is a community-focused advisory group, made up of local professionals from product and service companies directly supporting those planning the transition into retirement for themselves or others. Alice is on the Membership Board of this organization as well.

She received her Master of Education from Marymount University and her B.S. in Sociology from The American University.

Dari Pogach, JD

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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.

Irene Rausch, NMG

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Irene Rausch has served as professional guardian since 1982. She holds a Master's Degree in Applied Anthropology and earned the National Master Guardian certification in 2000. She served as President of the Guardian Association of Pinellas County (1987, 1988, 2012, 2013). She developed and conducted the initial 40-hour training at St. Petersburg Junior College in 1988. Irene also served as President of the Florida State Guardianship Association (1989, 1990) and coordinated the first state conference St. Petersburg in 1989.

Irene was elected as a charter member of the NGA Board of Directors in 1988 and served for 9 years on the Board. During her term, she served as Conference Chairman for 6 years. While on the NGA board she assisted with the development of the NGA Registered Guardian Handbook, 8-hour training and initial exam for RG certification. Irene has personally conducted 125 40-hour guardian training programs in Pinellas and Hillsborough counties since 1989 and is the author of "A Practical Guide to Guardianship."

Ira Salzman, JD

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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 Guardianship Committee. He is the former co-chair of its Medicaid Committee and former co-chair of its Legislation Committee.

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.

Emily Smith, CSW, NCG

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Emily Smith is the Executive Director of Wyoming Guardianship Corporation (WGC), Wyoming's only nonprofit specializing in both life and financial management services. In addition to providing guardian and conservator services WGC serves as power of attorney, representative payee and personal representative for Wyoming clients with disabilities. WGC also operates both 1st and 3rd party pooled trusts and serves as trustee for private special needs trusts.

Emily has provided numerous workshops on guardianship, fiduciary work, protective services and advocacy. Her years of experience are with a diverse population of people who have a variety of disabilities including mental health illness, substance abuse disorders, intellectual disability and Alzheimer's or other dementias. She sits on the Wyoming State Adult Protection Team and the Governor's Elder and Vulnerable Adult Task Force. She has a Bachelor of Arts degree in social work from Boise State University and has completed graduate level course work in public administration from the University of Colorado. She has been a certified social worker for 19 years and is a Nationally Certified Guardian from the Center for Guardianship Certification.

Pamela B. Teaster, Ph.D.

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Pamela B. Teaster is the Director of the Center for Gerontology and a Professor in the Department of Human Development and Family Science at Virginia Tech. She is the North American Representative of the International Network for the Prevention of Elder Abuse, is President-Elect of the Board of Trustees of the Center for Guardianship Certification, and serves on the Editorial Boards of the *Journal of Elder Abuse and Neglect* and the *Journal of Trauma, Violence, and Abuse Review*. Dr. Teaster is a Fellow of the Gerontological Society of America and the Association for Gerontology in Higher Education. She is a recipient of the Isabella Horton Grant Award for Guardianship (National College of Probate Judges), the Rosalie Wolf Award for Research on Elder Abuse (National Adult Protective Services Association), the Outstanding Affiliate Member Award (Kentucky Guardianship Association), and the Distinguished Educator Award (Kentucky Association for Gerontology). She is a former president of the National Committee for the Prevention of Elder Abuse. She has received continuous grant and contract funding for over 20 years from multiple public and private sources. Her areas of scholarship include the abuse of elders and vulnerable adults, guardianship, end-of-life issues, ethical treatment of older adults, and public policy and public affairs. She has published over 125 scholarly articles, reports, and book chapters and is editor/author of 5 books.

Lisa Wawrzonek, MS

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Lisa Wawrzonek is current the Manager of Special Projects and Guardianship Compliance for the Anchorage Probate Court assisting with a number of court improvement projects including monitoring of adult guardian and conservatorships. She has been a Court Visitor across the State for the past nineteen years. In addition, she coordinates the Alaskan WINGS committee and administrates ASAGA which is the Alaska State Association for Guardianship and Advocacy that currently functions as a guardianship assistance program for families and others needing help navigating the guardianship system. Lisa graduated from the University of Alaska-Anchorage with a bachelors in Human Service, an Advanced Certificate in Human Services and from the University of Boston-Mass with her masters in Gerontology. She is also a volunteer guardian for a non-related disabled adult.

Jessica Wayne

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Jessica Wayne earned a bachelor's degree in Arts of Psychology from the University of Louisville in 2002. Jessica began her career with the Commonwealth of Kentucky in 2004 as a social service worker with the state guardianship program. In 2011, she was promoted to supervisor over the largest guardianship region in Jefferson County. In 2014, she became an Assistant Director for Division of Guardianship and its daily operations and staffing. This program is responsible for the health, safety and welfare of more than 4500 wards in Kentucky.

Denise Wells

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Denise Wells is the Bluegrass District Ombudsman at the Nursing Home Ombudsman Agency of the Bluegrass (NHOA). As District Ombudsman, she coordinates ombudsman services for more than 5,600 long-term care residents in 17 counties. Denise has been with NHOA for nearly 5 years, in her current position for 4. Denise earned her BA in Sociology and Psychology and worked for 5 years in long-term care.

Jan Welsh

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Jan is the owner and founder of Special Care for Older Adults, LLC, a professional Aging Life Care® company serving Southwestern Ohio and Northern Kentucky since 1999.

Ms. Welsh has Care Manager Certification (CMC), is a Certified Rehabilitation Counselor (CRC) and a Licensed Professional Counselor in the State of Ohio. She has an MS degree in Human Services from Xavier University and has extensive experience in the behavioral health and rehabilitation fields. Jan's twenty years' experience doing Aging Life Care includes Guardianship work.

Jan is an active member of several professional organizations including the Aging Life Care Association. She is Past President of the Midwest ALCA Chapter, and was a Director on the ALCA Board from 2013-2018. She led the Webinar Committee and served on numerous other committees in this professional organization which she credits as being key in her training and success as an Aging Life Care Professional® and business owner.

Jan is a sponsor of the Association for Professionals in Aging, and has presented at regional and national meetings. Awards include Outstanding Service Provider from the Association of Professionals in Aging and Outstanding Chapter Member from the Midwest ALCA Chapter.

Special Care for Older Adults, LLC is pleased to be celebrating its twentieth anniversary this year.