



# NATIONAL CONFERENCE ON GUARDIANSHIP

October 24 - 27, 2015

Phoenix Marriott Mesa

Mesa, Arizona

## EXCELLENCE ON A GRAND SCALE

# CONFERENCE SCHEDULE AT-A-GLANCE

(Conference intensives require separate registration.)

### Saturday, October 24

7:00 am - 5:00 pm Registration area open  
 8:00 am - 11:30 am Conference intensive:  
**Guardianship Clinic**  
 8:30 am - 4:00 pm Conference intensive:  
**Legal Review**  
 12:30 pm - 4:30 pm Conference intensive:  
**The Wide Wide World of Trusts**  
 1:00 pm - 3:00 pm State Affiliates meeting  
 5:30 pm - 6:30 pm Welcome reception

### Sunday, October 25

7:00 am - 5:00 pm Registration area open  
 7:30 am - 8:15 am New member breakfast  
 7:30 am - 8:30 am Continental breakfast  
 8:30 am - 8:45 am Welcome/opening remarks  
 8:45 am - 10:00 am **The Brooke Astor Story: Hard-Learned Lessons That Inform Elder Justice**  
 10:00 am - 10:30 am Break/visit with exhibitors  
 10:30 am - 11:45 am Concurrent breakout sessions  
 12:00 pm - 1:15 pm Annual meeting luncheon  
 1:30 pm - 2:45 pm **The ABL Act: Another Tool in the Tool Chest**  
 2:45 pm - 3:15 pm Break with exhibitors  
 3:15 pm - 4:45 pm Concurrent breakout sessions  
 5:30 pm - 7:00 pm Reception with exhibitors and live auction  
 7:00 pm Dinner on your own

### Monday, October 26

7:00 am - 5:00 pm Registration area open  
 7:30 am - 8:15 am Continental breakfast with exhibitors  
 8:15 am - 9:30 am **A Matter of Respect – Using the Least Intrusive Legal Intervention**  
 Break  
 9:30 am - 9:45 am Concurrent breakout sessions  
 9:45 am - 11:00 am Coffee break with exhibitors  
 11:00 am - 11:15 am Concurrent breakout sessions  
 11:15 am - 12:30 pm Networking luncheon and dessert with exhibitors  
 12:30 pm - 1:45 pm Concurrent breakout sessions  
 Break  
 2:00 pm - 3:15 pm Concurrent breakout sessions  
 3:15 pm - 3:45 pm Break  
 3:45 pm - 5:00 pm Concurrent breakout sessions  
 5:00 pm Open evening

### Tuesday, October 27

7:00 am - 9:00 am Registration area open  
 7:00 am - 8:15 am Continental breakfast  
 8:15 am - 9:30 am **Ethics: How to Have Them and Use Them**  
 Coffee break  
 9:30 am - 9:45 am **The Next Frontier of Guardianship: Locating, Collecting, and Safeguarding Digital Assets**  
 9:45 am - 11:00 am  
 11:00 am Conference adjourns



# CONFERENCE SCHEDULE



**2015 National Conference on Guardianship  
October 24 - 27, 2015 • Phoenix Marriott Mesa • Mesa, AZ**

## CONFERENCE INTENSIVES ON SATURDAY, OCTOBER 24

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

8:30 am – 4:00 pm

### Legal Review

**Steven D. Fields, Esq., Tarrant County Probate Court Two**

**Terry W. Hammond, Terry W. Hammond & Associates**

**Sally Balch Hurme, JD**

**Robert A. McLeod, Lindquist & Venum, LLP**

**Ira Salzman, Esq., Goldfarb Abrandt Salzman & Kutzin, LLP**

**Erica Wood, Esq., American Bar Association Commission on Law and Aging**

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

8:00 am – 11:30 am

### Guardianship Clinic

**J.R. Rittenhouse, Rittenhouse Fiduciary Services, LLC**

**Stephanie Bivens, Bivens & Associates, PLLC**

Share your triumphs and troubles with your colleagues! This interactive session provides the opportunity for experienced guardians and newcomers to learn they are not alone when making difficult decisions and administering complex cases.

### Lunch on your own

12:30 pm – 4:30 pm

### The Wide Wide World of Trusts

**Frank Acuña, Acuña, Regli & Klein, LLP**

You've been asked to be a trustee of a trust, but what kind of trust is it? This intensive session examines a wide variety of trusts, from single person grantor trusts through the most complex irrevocable trusts being drafted today. Among the trusts and concepts to be discussed will be: Testamentary vs. Inter-Vivos Trusts, Single Person Grantor Trusts, Married Persons Trusts (A-B, Disclaimer, QTIP), Reciprocal Unmarried Partner Trusts, Spendthrift Trusts, Special Needs Trusts, Charitable Lead Trusts, Charitable Remainder Trusts, Gift ("Crummey") Trusts, Irrevocable Life Insurance Trusts, Rabbi Trusts, Intentionally Defective Grantor Trusts, and Grantor Retained Interest Trusts.

## SATURDAY, OCTOBER 24

1:00 pm – 3:00 pm

**State Affiliates meeting (invitation only)**

5:30 pm – 6:30 pm

**Welcome reception**

## SUNDAY, OCTOBER 25

(F) = Family guardians are encouraged to attend

7:00 am – 5:00 pm

**Registration area open**

7:30 am – 8:15 am

**New member breakfast**

7:30 am – 8:30 am

**Continental breakfast with optional table discussion topics**

8:30 am – 8:45 am

**Welcome/opening remarks**

**J. R. Rittenhouse, 2015 Conference Chair**

**Honorable Kerstin G. LeMaire, Commissioner, Superior Court in Maricopa County, Arizona**

8:45 am – 10:00 am

**The Brooke Astor Story: Hard-Learned Lessons That Inform Elder Justice (F)**

**Philip C. Marshall, Roger Williams University**

Even when an elder's advocate is close, his or her enemy may be closer, yet difficult to detect—for perpetrators are frequently family, friends, or caregivers. The presenter will share his personal story as a grandson helping his grandmother through a successful petition for guardianship to help stop the emotional abuse and financial exploitation by his father. Hard-learned lessons will be placed in a broader context, aimed toward advancing elder justice and recognizing the critical role of guardianships.



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**10:00 am – 10:30 am** Break with exhibitors

**10:30 am – 11:45 am** **Concurrent breakout sessions**

**1) Ethical Strategies for End-of-Life Decision Making (F)**

**Viki Kind, KindEthics.com**

Advocating for a good end-of-life experience is about more than a medical treatment. It is about making sure that the decision focuses on how it will be experienced in this individual's life. Viki will also address common ethical challenges.

**2) Nothing About Me Without Me: Person-Centered Planning and Guided Decision-Making (F)**

**Yolande Erickson, Bet Tzedek Legal Services**

**Bertha Sanchez Hayden, Bet Tzedek Legal Services**

Intellectually/developmentally disabled adults under guardianship should be involved in the planning of their lives to ensure inclusion and as much independence as possible. This session will look at tools to assist with supported decision-making and person-centered planning.

**3) Cookies and Cream – The Art of Communicating with Difficult VIPs (F)**

**Loren R. Acuña, MBA, CPLF, The ACE Fiduciary Group**

You hear frustration in his or her voice. You see the beneficiary intends to thwart your agenda. You know what needs to be done, but he or she just don't want to listen! Learn techniques to protect yourself, manage these situations, and reduce stress.

**12:00 pm – 1:15 pm** Lunch and annual meeting

**1:30 pm – 2:45 pm** **The ABLE Act: Another Tool in the Tool Chest**

**Stephen Dale, The Dale Law Firm**

This presentation will review the ABLE Act with a focus on when this tool is appropriate and when other tools may be appropriate. There are many situations where an ABLE account can assist families in saving for long-term needs.

**2:45 pm – 3:15 pm** Break with exhibitors

**3:15 pm – 4:45 pm** **Concurrent breakout sessions**

**1) Is a Pooled Trust a Viable Option in Guardianship Cases?**

**Helen Ferraro-Zaffram, Esq., Legal Services for the Elderly, Disabled or Disadvantaged of WNY, Inc.**

**Kathy Kanaley, Legal Services for the Elderly, Disabled or Disadvantaged of WNY, Inc.**

Learn about pooled trusts as an option in guardianship cases. Who is eligible, and what are the criteria for eligibility? What types of pooled trusts are there? How can funds placed in the trust be used?

**2) Emergence of Referral Specialists and Placement Industry Sub Topic: Self Guidance Without Regulation (F)**

**Scott M. Fischer, Professional Association of Senior Referral Specialists**

"Senior referral specialists" are utilized by professional guardians and families to assist in the selection of suitable senior living based on the needs of the person. This session will provide tools to assess which specialist can best assist the process and the decision maker.

**3) Ethics Jeopardy!**

**Frank R. Acuña, Esq., Acuña, Regli & Klein, LLP**

One of NGA's most popular sessions has returned for 2015! Join the next best thing to Alex Trebek as you navigate fiduciary ethics! Familiar subjects return, including: *Those Pesky Attorneys*, *Duck and Cover*, *Funny Business*, and *The Family*. And we welcome new topics like *You Did What?? (to Whom???)* and *Just Call Me Blabby*. And remember, your response must be in the form of a question!

**5:30 pm – 7:00 pm** Reception with exhibitors and live auction

## OUR SILENT AND LIVE AUCTIONS ARE FUN AND IMPORTANT!

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

Even if you can't attend, you are invited to be part of the auction. Find auction information at [www.guardianship.org](http://www.guardianship.org).



NATIONAL GUARDIANSHIP ASSOCIATION

# NATIONAL CONFERENCE ON GUARDIANSHIP

## MONDAY, OCTOBER 26

(F) = Family guardians are encouraged to attend

7:00 am – 5:00 pm

Registration area open

7:30 am – 8:15 am

Continental breakfast with exhibitors and optional table discussion topics

8:15 am – 9:30 am

**A Matter of Respect – Using the Least Intrusive Legal Intervention**

**Charles Arnold, Frazer, Ryan, Goldberg & Arnold, L.L.P.**

This discussion will address the many ways to maximize and foster independence of those we seek to protect by using the least intrusive – and most respectful – legal intervention.

9:30 am – 9:45 pm

Break with exhibitors

9:45 am – 11:00 am

**Concurrent breakout sessions**

**1) Comprehensive Care Management: Maximizing Expertise (F)**

**Gretchen Napier, Life-Links Care Management & Advocacy**

Case managers step into complicated situations and create calm out of chaos by coordinating services, opening avenues of communication, and streamlining processes that greatly benefit the client, family, and professionals who are working toward the best end result. In this session, attendees will explore the benefits of collaborating with a care manager and the ways in which that partnership makes their jobs easier.

**2) How to Deal with the International Assets of a Person Under Guardianship**

**Adrian Mundell, Ashton KCJ Solicitors**

In today's society, people often move through different countries and have assets in each of them. This session helps a guardian to consider what to do when it is discovered that a person under guardianship has foreign assets.

**3) Straight Talk about Elder Financial Abuse: Best Practices in Prevention and Communication**

**James Tinsley, True Link Financial**

**Shawna Reeves, Institute on Aging**

**Matt Paxton, Clutter Cleaner & ServiceMaster Restore**

Elder financial abuse costs older Americans \$36 billion dollars annually. Guardians are uniquely positioned to address exploitation and abuse. This expert panel, featuring Matt Paxton of TV's *Hoarders*, will focus on recognizing and preventing abuse and communicating clearly and respectfully with vulnerable seniors and their families.

11:00 am – 11:15 am

Break with exhibitors

11:15 am – 12:30 pm

**Concurrent breakout sessions**

**1) Guardians Facilitating Interrelated Service Systems**

**Michael W. Mackniak, NCG, Guardian Ad Litem Services, Inc.**

Melissa's Project is the flagship program of Guardian Ad Litem Services, Inc. The program and treatment modality was developed as a collaborative effort between Connecticut's Probate Court Administration and Department of Mental Health and experienced guardians/conservators.

**2) Managing Challenging Behavior by Using "Benevolent Manipulation" (F)**

**Mindi R. Blanchard, M.Ed., CPG, Bridge Builders, Ltd.**

Managing behaviors exhibited by individuals with dementia can be extremely challenging. This session will provide instruction on how to use calculated "natural consequences" and "benevolent manipulation" to change the response of the individual with dementia.

**3) Understanding Hoarding Disorder**

**Mary E. Coalson, LAC, The Area Agency on Aging, Region One, Inc.**

This presentation will address hoarding in older adults, differentiating between squalor and crisis situations. An overview of the causes of hoarding, different perceptions of hoarding, and effective techniques and resources that help overcome common obstacles to change will be discussed.

12:30 pm – 1:45 pm

Networking luncheon and dessert with exhibitors

2:00 pm – 3:15 pm

**Concurrent breakout sessions**

**1) Reconciling Self-Determination and the Duty to Protect (F)**

**Dominique Sanz-David, Esq., Bet Tzedek Legal Services**

**Janet Morris, Bet Tzedek Legal Services**

This session will explore common types of abuse, neglect, and self-neglect of elders and intellectually/developmentally disabled adults who are under a guardianship. It will also examine the guardian's duty to protect the person from abuse and promote independence, as well as the tools that the guardian can use to reconcile these charges.



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## 2) Got Plans? The Role of Future Plans in Decision-Making for People with I/DD (F)

**Robin Shaffert, The Arc**

Learn about The Arc's Center for Future Planning. Explore how planning can support individuals to make decisions and enable families to explore alternatives to guardianship. See how supporters and guardians benefit from information gathered and wishes expressed in future plans.

## 3) Disclosure: "Opening the Kimono" Is No Laughing Matter!

**Frank R. Acuña, Esq., Acuña, Regli & Klein, LLP**

Fiduciaries act in a strange vacuum. They are charged with duties to act on behalf of a person who is not competent to act upon information, but they can be sued later for not fully disclosing what they did or how they acted. When does the duty of disclosure arise? To whom must disclosure be made? How should disclosure be made? And, are there circumstances in which disclosure may violate a client's privacy rights? If you have ever wrestled with disclosure issues (and all of us will someday), this is the class for you!

3:15 pm – 3:45 pm

Break

3:45 pm – 5:00 pm

Concurrent breakout sessions

## 1) Caring for Those with Alzheimer's Disease and Dementia (F)

**Scott Greenberg, ComForcare Senior Services**

The presentation is designed to offer real-world, practical tips on how to care for your loved one suffering from Alzheimer's or dementia. The presentation will include understanding the skills required to respond to certain behaviors and role-playing of specific behavior scenarios, ensuring positive outcomes.

## 2) Let's Protect Our Seniors: The Tools You Need to Fight Abuse, Neglect and Exploitation

**Gizelle Jones, MSW, LISW-S, Jewish Family Service**

**J.J. Mesko-Kimmich, M.Ed., PC, Jewish Family Service**

Participants will learn facts and statistics of abuse, neglect and exploitation of older adults. They will discuss case scenarios, learn to apply current techniques to identify abuse, and understand how agencies can protect our seniors through strategic programs and initiatives.

## 3) Four Bioethics Tools for Shared Decision-Making

**Viki Kind, KindEthics.com**

Learn four bioethics tools to use in order to include and empower the person in shared decision-making. This respectful process is not a one-size-fits-all solution, but it can be adapted depending on a person's level of incapacity and the situation.

5:00 pm

Open evening

# TUESDAY, OCTOBER 27

7:00 am – 9:00 am

Registration area open

7:30 am – 8:15 am

Continental breakfast with optional table discussion topics

8:30 am – 9:45 am

**Ethics: How To Have Them and Use Them**

**Dr. Marianne Jennings, Emeritus Professor, Arizona State University**

As professions develop, they struggle with ethical standards. Even after those ethical standards are developed, we need examples, guidance, and tools for living and applying them. This session features a look at what ethical standards mean, how to develop them, and the warning signs of ethical lapses.

9:30 am – 9:45 am

Coffee break

9:45 am – 11:00 am

**The Next Frontier of Guardianship: Locating, Collecting, and Safeguarding Digital Assets**

**Charles P. Golbert, Esq., Office of the Cook County Public Guardian**

More than half of Americans age 65 and older use the internet or email, and they are the fastest-growing population on the internet. In the near future, we will have people under our guardianship with substantial digital assets. Digital assets can include password-protected online bank and investment accounts, books, music libraries, cherished photographs and letters, intellectual property, and important documents, to name a few. Although a guardian should be able to step into the shoes of the person under guardianship to access all types of digital assets, the law is as yet unsettled. This session will discuss the types of digital assets a person might own, how to locate them, and the emerging law including the Uniform Fiduciary Access to Digital Assets Act, which was approved in 2014 and has already been enacted in one state and introduced in 22 more.

11:00 am

Conference adjourns

# CONFERENCE DETAILS

## HOTEL INFORMATION



**Phoenix Marriott Mesa**  
200 North Centennial Way  
Mesa, AZ 85201  
Phone: 480-898-8300  
[Book Online](#)

The Phoenix Marriott Mesa is a newly renovated, 12-story high-rise hotel located in the heart of the Phoenix East Valley, only 12 miles from Phoenix Sky Harbor International Airport. Close to Arizona State University, dining, golf, shopping, and tourist attractions, the hotel features a recently upgraded 24-hour fitness center, heated pool and spa, complimentary parking, restaurant and bar, room service, and convenient free wireless high-speed internet in public spaces.

For reservations, visit the reservation [website](#)  
or

call the hotel directly at 480-898-8300.

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

**Group Room Rate: \$124.00 for single or double occupancy, plus local taxes.**

NGA cannot guarantee room availability. The discounted group rate concludes on **Friday, October 2, 2015**. Rooms will be available at the discounted rate until that date, or until the block is filled, whichever comes first. Please be aware that the NGA room block often **fills before the deadline**. At that point, you are competing with other guests for rooms. Requests for reservations after October 2 will be accepted by the hotel on a space and rate availability basis. For those making reservations prior to the deadline, rooms may also be available at the group rate on the three days prior to and the three days after the actual conference to accommodate vacation planning.

**Transportation:** The SuperShuttle offers round-trip airport transfers for \$17.00 (one way). Visit the [website](#) for an online reservation. Taxi fare costs approximately \$36.00 (one way).

Complimentary parking is available on-site.

## CONTINUING EDUCATION

This conference program holds a potential of 21.0 credit hours. Because each accrediting body must approve the program prior to assigning credits, the specific number of credits accepted by each state and for each type of credit will not be definite until October. Keep in mind that not all hours will be deemed acceptable for all types of credit. Questions about continuing education credits can be sent to Kelly Dolan at [education@guardianship.org](mailto:education@guardianship.org) or by calling NGA at 877-326-5992, ext. 2.

### Proof of Attendance

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

### Verified Certificate of Attendance

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

### Guardianship Credits

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

### Continuing Legal Education Credits

NGA has applied to offer Continuing Legal Education credit in Utah. Certificate fees apply to receive a legal certificate. Individuals outside of Arizona or Utah seeking legal credits should contact their state boards prior to the conference to see if their process requires a legal or a verified certificate. A verified certificate is included with the conference fee. If you have questions regarding legal credits, please contact Kelly Dolan at [education@guardianship.org](mailto:education@guardianship.org).

### Social Work Credits

NGA applies for social work credits with the NASW and any states that do not accept NASW certification. For a certificate documenting the pre-approved social work credits, a fee will be required.

### Issuing of Certificates

To issue your certificate in a timely manner, NGA must receive your attendance sign-in sheets (which will be enclosed in the conference packet) before you leave the conference. Certificates are downloaded online. All certificates ordered before the conference will be issued within 45 days of the conference. Attendees are urged to check their conference packets upon arrival to obtain the most current continuing education information.



# TRAVEL AND TOURISM



## THINGS TO DO IN MESA AND THE SURROUNDING AREA

### Mesa Arts Center

The Mesa Arts Center, owned and operated by the City of Mesa, is a unique, architecturally stunning, international-award winning facility located in the heart of downtown Mesa. Arizona's largest arts center is home to four theaters, five art galleries, and 14 art studios. Guests, patrons, and students come to Mesa Arts Center to enjoy the finest live entertainment and performances, world-class visual art exhibitions, and outstanding arts education classes. See what the facility has to offer [here](#).

### Usery Mountain Regional Park

Located on the Valley's east side, this park takes in 3,648 acres set at the western end of the Goldfield Mountains, adjacent to the Tonto National Forest. The park contains a large variety of plants and animals that call the lower Sonoran Desert home. Along the most popular feature of the park, the Wind Cave Trail, water seeps from the roof of the alcove to support hanging gardens of rock daisy. The Wind Cave is formed at the boundary between the volcanic tuff and granite on Pass Mountain. Breathtaking views from this 2,840-foot elevation are offered to all visitors. Usery Mountain Regional Park offers more than 29 miles of trails for hiking, mountain biking, and horseback riding. Park trails range in length from 0.2 miles to more than 7 miles and range in difficulty from easy to difficult. Learn more [here](#).

### Golf

With dozens of golf courses in the Phoenix/Mesa area, you have your choice of places to play. Plan your perfect shot [here](#)!

### Organized Tours

From a Desert Belle boat cruise on the winding Saguaro Lake to horseback riding at Saguaro Lake Ranch Stables, there is something for everyone to do. From relaxation to adventure, from hiking to hot air ballooning, choose your activity! Day tours are even available to the Grand Canyon! Learn more [here](#).

# BYOB

## (Bring Your Own Bag)

The conference committee guesses that you probably have enough tote bags, so this year's conference giveaway is something different. We won't spoil the surprise, but here's a hint: you can't carry papers in it or take notes with it.

So please plan to BYOB (bring your own bag), along with a tablet, pen, and anything else you need to stay organized and record information during the conference. Show your NGA pride and walk down memory lane by using a bag from a previous conference!

And if you have bags you're not using, feel free to bring them to share with anyone who hasn't read this part of the brochure!

## J. R.'S JOURNEY

*Conference Chair J. R. Rittenhouse has developed a one-day scenic drive that she recommends for anyone who wants to experience the beauty and history of Arizona.*

Get up early and head north out of the Valley to [Prescott](#) where you can stop and have a real cowboy breakfast at [The Lone Spur Café](#). Walk off breakfast across the street at the courthouse and town square. If you have time, stroll down [Whiskey Row](#) or walk among the shops.

Head up the mountain to [Jerome](#), a mining town turned artist colony. Watch that curvaceous road, and be sure to stop for some pictures at the top of the mountain. Visit the [Raku Gallery](#). Hiking in Jerome may use up the rest of your breakfast protein. There are several eating and drinking establishments, but, if you are ready for a rest and some repast, head up the road to [Page Springs Vineyard and Cellars](#), in Cornville. Enjoy a glass of wine, have lunch, or a snack – but no dessert – that comes later!

If a repast and wine is not your cup of tea, head up to the [Red Rock Country](#) of [Sedona](#). There are many places to visit to eat, but I suggest grabbing a quick bite and taking a [Pink Jeep Tour](#). It's a fabulous way to see those rocks and hear some western lore. If you like to shop, head to [Tlaquepaque](#) Sedona's arts and crafts village. You can even check out your chakras in a New Age Center. Before leaving Sedona, head up to the [Sky Ranch Lodge](#), grab a beer or glass of wine at the wine bar, and take in their view at sunset – you will not regret it!

On your trip back to the Valley, stop at [Rock Springs Café](#) in [Black Canyon City](#) for a cup of coffee and a piece of one of their famous pies.

This trip will show you the old West and the new West, as well as stunning geography beyond the Sonoran Desert and the Grand Canyon. Best of all, it can be done in one day. Enjoy!

# NGA Registration Form: 2015 National Conference on Guardianship

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

**Registration must be received on or before September 11 for the early bird discount.**

Click [here](#) to visit the conference website and register online.

Complete name, include any designations (please print clearly)

Name as you want it to appear on your name badge

Agency/Organization/Company

Mailing address

City State Zip

Phone Fax

Email (Confirmations are only sent by email.)

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

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

### Information About Conference Fees:

Registration for the Saturday Conference Intensives: *Legal Review, The Wide, Wide World of Trusts, or Guardianship Clinic* requires an additional fee. Payment covers one of these sessions. Registrants may only attend/receive the materials for the session for which they pay. Main conference handouts are not included in this fee.

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

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

Organizational members are entitled to pay member rates for all employees attending the conference.

## Registration Payment (Federal ID # 36-3591860)

- Please email me a receipt for my records.

**Online:** Have credit card available, and go to [www.guardianship.org](http://www.guardianship.org).

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

**Fax:** Provide credit card information and fax to 814-355-2452.

**Credit Card:**  Visa  MasterCard

Name on Card (print) \_\_\_\_\_

Account Number \_\_\_\_\_

Exp. Date \_\_\_\_\_ Security Code: \_\_\_\_\_

Signature \_\_\_\_\_

\$ \_\_\_\_\_ TOTAL FOR REGISTRATION FEES + \$ \_\_\_\_\_ FOR CERTIFICATE = \$ \_\_\_\_\_

No refunds will be issued after Monday, October 12. Cancellations after October 12 will receive a copy of materials from the conference. Changes or cancellations must be made in writing to Terri Breon at [registration@guardianship.org](mailto:registration@guardianship.org). Substitutions may be made in advance.

## 2015 Conference Registration

### Discounted registration if received BEFORE September 11.

#### NGA Member Fees:

Full conference @ \$385 \$ \_\_\_\_\_  
 Sunday or Monday only @ \$180 \$ \_\_\_\_\_  
 Tuesday only @ \$80 \$ \_\_\_\_\_

#### Non-Member Fees:

Full conference @ \$555 \$ \_\_\_\_\_  
 Sunday or Monday only @ \$255 \$ \_\_\_\_\_  
 Tuesday only @ \$95 \$ \_\_\_\_\_

#### Family Guardian Single-Day Fee:

Single day @ \$50 (Sunday or Monday, includes sessions, exhibits, and all food functions until 5:00 pm) \$ \_\_\_\_\_

### Regular registration AFTER September 11.

#### NGA Member Fees:

Full conference @ \$425 \$ \_\_\_\_\_  
 Sunday or Monday only @ \$195 \$ \_\_\_\_\_  
 Tuesday only @ \$95 \$ \_\_\_\_\_

#### Non-Member Fees:

Full conference @ \$600 \$ \_\_\_\_\_  
 Sunday or Monday only @ \$270 \$ \_\_\_\_\_  
 Tuesday only @ \$120 \$ \_\_\_\_\_

#### Family Guardian Single-Day Fee:

Single day @ \$50 (Sunday or Monday, includes sessions, exhibits, and all food functions until 5:00 pm) \$ \_\_\_\_\_

**Total for Conference Registration:** \$ \_\_\_\_\_

### Not an NGA Member? Join Now and Save on Your Registration!

Individual Membership @ \$180 \$ \_\_\_\_\_

Organization Membership @ \$260  
(plus \$110 for each additional organization member) \$ \_\_\_\_\_

Family, Volunteer or Retired Membership at \$60 \$ \_\_\_\_\_

## Register Here for Conference Intensives

#### Legal Review

	Before Sept. 11	After Sept. 11	
NGA Member	\$130	\$155	\$ _____
Non-Member	\$155	\$180	\$ _____

#### Guardianship Clinic

	Before Sept. 11	After Sept. 11	
NGA Member	\$80	\$105	\$ _____
Non-Member	\$105	\$130	\$ _____

#### The Wide, Wide World of Trusts

	Before Sept. 11	After Sept. 11	
NGA Member	\$80	\$105	\$ _____
Non-Member	\$105	\$130	\$ _____

**Total Conference Intensives:** \$ \_\_\_\_\_

**Use the separate form to order a Certificate of Attendance prior to the conference**





# CERTIFICATE OF ATTENDANCE ORDER FORM



**NGA Conference on Guardianship  
October 24 – 27, 2015  
Mesa, AZ**

Any person needing a certificate of attendance for the Center for Guardianship Certification or California Fiduciary Bureau WILL NOT need to purchase a certificate. A verified certificate of attendance will be provided following the conference for every attendee who submits the attendance verification sheets. (Please allow 45 days following the event for receipt of certificate.)

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

<input checked="" type="checkbox"/>	Certificate Type	Certificate Use	Fee for Certificate
	Guardianship	Florida or Washington	\$25.00
	Legal	Used for Arizona (unless your state accepts the Arizona approval)	\$50.00
	Social Work	Certificate may be used for all states	\$50.00

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

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

Name \_\_\_\_\_

Email \_\_\_\_\_ Phone \_\_\_\_\_ Fax \_\_\_\_\_

Company \_\_\_\_\_

Address \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_ Zip Code \_\_\_\_\_

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

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

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