NATIONAL GUARDIANSHIP ASSOCIATION

National Conference on Guardianship

Colorado Springs, Colorado

The PEAK of Guardianship Education

October 14 – 17, 2017 • Cheyenne Mountain Resort

Conference Schedule at a Glance

(Conference intensives require separate registration.)

Saturday, October 14

7:00 am – 5:00 pm	Registration area open
8:15 am – 11:30 am	Conference intensive: **Guardianship Clinic**
8:30 am – 4:00 pm	Conference intensive: **Legal & Legislative Review**
11:30 am – 12:30 pm	Lunch on your own
12:45 pm – 4:00 pm	Conference intensive: **Organizing and Managing Your Firm Through Document Management**
4:00 pm – 5:30 pm	State Affiliates meeting
5:30 pm – 6:30 pm	Welcome reception

Sunday, October 15

6:30 am – 8:15 am	Breakfast in the hotel restaurant
7:00 am – 5:00 pm	Registration area open
7:30 am – 8:15 am	New member breakfast
8:20 am – 8:30 am	Welcome/opening remarks
8:30 am – 10:00 am	**Judges Panel**
10:00 am – 10:30 am	Break with exhibitors
10:30 am – 11:45 am	Concurrent breakout sessions
11:45 am – 1:15 pm	Annual meeting luncheon
1:30 pm – 2:45 pm	Concurrent breakout sessions
2:45 pm – 3:00 pm	Break with exhibitors
3:00 pm – 4:15 pm	Concurrent breakout sessions
4:15 pm – 4:30 pm	Break with exhibitors
4:30 pm – 5:30 pm	Concurrent breakout sessions
6:00 pm – 7:30 pm	Reception with exhibitors and live auction
7:00 pm	Evening on your own

Monday, October 16

6:30 am – 8:00 am	Breakfast in the hotel restaurant
7:00 am – 5:00 pm	Registration area open
8:15 am – 9:45 am	**It's Not Just Dementia! What Every Guardian Needs to Know About Mental Health**
9:45 am – 10:00 am	Break with exhibitors
10:00 am – 11:15 am	Concurrent breakout sessions
11:15 am – 11:30 am	Break with exhibitors
11:30 am – 12:45 pm	Concurrent breakout sessions
12:45 pm – 1:45 pm	Networking luncheon
2:00 pm – 3:15 pm	Concurrent breakout sessions
3:15 pm – 3:45 pm	Break with exhibitors
3:45 pm – 5:00 pm	Concurrent breakout sessions
5:30 pm	Open evening with dine-around

Tuesday, October 17

6:30 am – 8:00 am	Breakfast in the hotel restaurant
7:00 am – 11:30 am	Registration area open
8:15 am – 9:45 am	**Palliative Care, Part One: What is It, and Why Does It Matter to My Client?**
9:45 am – 10:00 am	Break
10:00 am – 11:30 am	**Palliative Care, Part Two: The Palliative Approach – Practical Integration of Palliative Care with Client Services**
11:30 am	Conference concludes

Conference Schedule

National Conference on Guardianship • October 14 – 17, 2017
Cheyenne Mountain Resort • Colorado Springs, CO

Conference Intensives on Saturday, October 14

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

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

8:15 am – 11:30 am — **Guardianship Clinic**
Wanda Bevington, NCG, LSW, MS, Personal Guardianship Services, Inc.
Karen Buchanan, Colorado Elder Care Solutions/Guardianship Solutions
Jean Krahn, NMG, Kansas Guardianship Program

Back by popular demand! Join your colleagues for a fast-paced discussion of your most pressing issues, get your how-to questions answered by the experienced facilitators and other participants, and learn that you are not alone when making your most difficult decisions. All participants will share solutions to the most common – and most difficult – problems guardians face. Using case studies and participants' questions, experienced and novice guardians will discuss proven ways to enhance their services.

8:30 am – 4:00 pm — **Legal and Legislative Review**
Steven D. Fields, JD, Tarrant County Probate Court Two
Terry W. Hammond, JD, Terry W. Hammond & Associates
Sally Hurme, JD
Robert A. McLeod, JD, Briggs & Morgan, PA
Ira Salzman, JD, Goldfarb Abrandt Salzman & Kutzin, LLP
Erica Wood, JD, 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.

11:30 am – 12:30 pm — **Lunch on your own**

12:45 pm – 4:00 pm — **Organizing and Managing Your Firm Through Document Management**
Kevin Anderson, Lucion Technologies

You know it's time to take another step toward streamlining your practice. The problem is knowing what that step is – and having the time to implement it.

In this session, we'll take on the biggest speed bump for most practices: document management. We'll demonstrate simple solutions that are easy and inexpensive to implement, but that will make a significant difference in your day-to-day operations. Topics include: sharing files on the network, organization strategies, capturing any kind of document, hassle-free scanning, making better use of PDFs, cloud access, and the best ways to share documents with clients.

Saturday, October 14

4:00 pm – 5:30 pm — **State Affiliates meeting (invitation only)**

5:30 pm – 6:30 pm — **Welcome reception**

National Conference on Guardianship

Sunday, October 15

6:30 am – 8:15 am — **Full buffet breakfast in the hotel's Mountain View Restaurant**
(breakfast is included with your conference registration fee)

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

7:30 am – 8:15 am — **New member breakfast**

8:20 am – 8:30 am — **Welcome/opening remarks**
Lucille Lyon, 2017 Conference Chair

8:30 am – 10:00 am — **Judges Panel**
Judge Amanda Matzke, Brazos County Court at Law #1, Texas
Judge Elizabeth Cutter, Hennepin County District Court, Minnesota
Judge Frances Johnson, Fourth Judicial District, Colorado
Moderated by Terry W. Hammond, Terry W. Hammond Consulting

In this session, a panel of probate judges from Colorado, Minnesota, and Texas will discuss the challenges facing the probate courts today, the opportunities to improve guardianship practice locally and nationally, and best practices guardians and attorneys can use to support their clients. The discussion will include questions from the audience, and probing questions from our moderator to extract insight into the workings of a probate court.

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

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

The Right to Fail: Supporting the Decisions of Individuals Under Guardianship to Achieve Their Dreams

Heather Raimondo-O'Brien, NCG, Wyoming Guardianship Corporation
Emily Smith, NCG, CSW, Wyoming Guardianship Corporation

Everyone has failed at something. People under guardianship have the right to try and fulfill their goals or desires, even if there is fear from their treatment team that they may fail. The experience of trying to achieve goals is a reward and something everyone deserves.

What Guardians Need to Know About 529 College Savings Plans and ABLE Accounts

Ted Ong, Prudent Investors Network

529 plans and ABLE accounts are tax-advantaged savings plans to encourage saving for college costs and Qualified Disability Expenses. 529 plans, known as "qualified tuition plans," can be beneficial for fiduciaries who have minors planning on attending college or large estates subject to estate taxes. ABLE accounts offer tax-advantaged accounts for the disabled.

Volunteer Guardian Advocate Program

Mindi R. Blanchard, M.Ed., CPG, Guardian Institute

The need is great for guardians willing and able to take the very low income guardianships. The number of individuals who would benefit from a guardian is unknown. This volunteer program takes a provision in Washington State law for lay guardians and makes it user-friendly for volunteers who wish to serve as lay guardians. The program provides additional training, mentoring, and other supports to protect the individual under guardianship, such as a provision for finding another volunteer guardian should a current volunteer no longer be able to serve and the volunteer guardian would not handle the client's money. This program is designed to address the very low-income individuals who are on SSI, but it can also recruit volunteers for individuals with cultural or religious considerations, or those needing a guardian who is bilingual. This program can be easily modified to use in different cultures and communities.

11:45 am – 1:15 pm — **Lunch and annual meeting**

1:30 pm – 2:45 pm **Concurrent breakout sessions**

Family Victimization: Elder Financial Abuse

David L. Carlson, JD, NCG
John H. Beckfield, JD, MS, NCG

Family members are often the persons from whom an incapacitated person needs protection. The case of "Richard" illustrates the issues common in investigating elder financial abuse and the resulting application of a strong elder abuse prevention statute.

What the #*%@ Is a Reasonable Fee? Taking the Mystery out of Billing in Guardianship Cases

Christopher Marchase, Pikes Peak Probate Services
Catherine Anne Seal, JD, CELA, Kirtland & Seal, LLC

This session will review the various guidelines for fees and talk about how to bill fairly and honestly so your bill can survive a reasonableness review.

Overview of the Long Term Care Ombudsman Program

Scott Bartlett, Pikes Peak Area Council of Governments

The Long Term Care Ombudsman Program is federally mandated to provide advocacy and protection to consumers of long term care services and supports. Ombudsmen investigate complaints and problems on behalf of facility residents and other interested parties. The program also works systemically to create change in policies, statutes, and services for long term care consumers. This session will discuss the mission of the program and how ombudsmen can be utilized by guardians to promote quality of life for their wards in long term care settings. The history and mission of the program will be discussed, as well as when and how to access ombudsmen for advocacy and educational services. This session will also discuss the importance of collaborative efforts and how the local Pikes Peak region ombudsman office works with our local community to improve the lives of vulnerable adults in care facilities.

2:45 pm – 3:00 pm **Break with exhibitors**

3:00 pm – 4:15 pm **Concurrent breakout sessions**

The Colorado End-of-Life Options Act: Implications for Clients, Caregivers, and Institutions

Chris Ruskey, MD, Interim HealthCare of Southern Colorado

In November 2016, Colorado voters approved the Colorado End-of-Life Options Act. This followed similar legislation passed in Oregon and Washington, and other states over the past 15-20 years. The ethical, moral, and legal implications to individuals, professionals, and institutions are profound. No matter where you stand on the "issue" of medically assisted end of life, this session will prove to be informative, provocative, and transforming.

Stressed Out and Fed Up? How to Work With the Difficult Family of a Person Under Guardianship

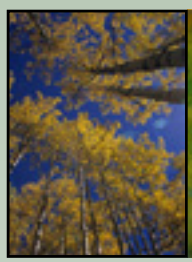
J. J. Mesko-Kimmich, M.Ed., LPC, Volunteer Guardian Program of Jewish Family Service
Gizelle Jones, LISW-S, Jewish Family Service

Participants will learn to effectively work with difficult families. This includes an overview of dysfunctional families and the roles of guardians and people under guardianship. The impact of stress on you and your work will be discussed, and techniques to create solutions will be provided.

The Changing World of Guardianships: How Independent Review of Court Cases Can Reform Guardianship Systems, Save Lives, and Preserve Estates

Terry W. Hammond, JD, NCG, Terry W. Hammond Consulting
Jorge Ramirez, JD, Office of Texas Senator Judith Zaffirini
David Slayton, Office of Court Administration

The 84th Texas Legislature provided an appropriation to the Office of Court Administration to fund the Guardianship Compliance Project. The Guardianship Compliance Project (GCP) is a service designed to assist courts with their monitoring of guardianship cases by conducting guardianship file reviews and audits to identify reporting deficiencies while assisting the courts in implementing best practices for monitoring and managing guardianship cases. In addition to the services provided by GCP staff, the project includes the development of an online reporting and monitoring system for guardians to file required reports electronically. The system will enable guardianship data to be tracked from year to year, provide alerts to identify potential reporting issues, prioritize cases to be reviewed by audit staff, and generate reports for judges to assist in monitoring guardianship cases. This session will examine the circumstances that led to creation of the GCP, the hope that the resulting data provides for lasting reform of the Texas guardianship system, and how the GCP can be a template for reform in other jurisdictions.



National Conference on Guardianship

4:15 pm – 4:30 pm **Break with exhibitors**

4:30 pm – 5:30 pm **Concurrent breakout sessions**

Reefer Madness: Legal and Ethical Implications for Cannabis Use

Carol Manteuffel, JD, RN, Husch Blackwell, LLP

As more states legalize cannabis for medical use, guardians are facing increased legal and ethical questions about facilitating medical and recreational requests. This session will address health benefits and medical developments of cannabis. It will also address how to avoid conflicts of interest when advocating for the least restrictions on a client's freedom and rights, while maximizing independence and personal needs and preferences.

Self-Determination in Guardianship: How to Maximize Participation in Decision-Making – A Case Study

Nicole Jorwic, JD, The Arc
Robin Shaffert, JD, The Arc

Join advocates from The Arc to explore how to promote self-determination and build decision-making skills with real life examples. Using case studies, we'll hone skills to respect preferences, ensure the dignity of risk, and work towards restoration of rights.

How to Protect Yourself with Good Court Accounting

Lucille Lyon, MPA, Retired Public Guardian

The court accounting reflects all the financial activities of an estate conservator. Court personnel, as well as other interested parties, review this document to ensure the estate conservator is prudently managing the estate. This discussion will cover how one should double check his or her own accounting and – in the event of being a successor estate conservator – how to review the document.

6:00 pm – 7:30 pm **Reception with exhibitors and live auction**

Monday, October 16

6:30 am – 8:00 am **Full buffet breakfast in the hotel's Mountain View Restaurant**
(breakfast is included with your conference registration fee)

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

8:15 am – 9:45 am **It's Not Just Dementia! What Every Guardian Needs to Know About Mental Health**

Steven A. Weisblatt, M.D., FAPA

Everyone would vote for accuracy in the assessment and treatment of mental health problems – unfortunately accuracy isn't running.

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

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

The purpose of this presentation is to equip guardians with a method to help maximize the potential of their patient by identifying co-morbid, unrecognized, medical problems or misdiagnosed or mistreated brain chemistry imbalances.

9:45 am – 10:00 am **Break with exhibitors**

National Conference on Guardianship

10:00 am – 11:15 am **Concurrent breakout sessions**

The Business of Caring for Others: Transforming Long-Term Care Into Lifelong Living

David Seaton,
LiveOak Living Community

Guardians and providers alike share in the responsibility to advocate and deliver services that optimize the person's well-being and quality of life in long-term care. This Lifelong Living approach requires the understanding and integration of humanistic and person-centered principles that promote opportunities for the person to thrive, rather than just survive.

Sex, Drugs, and Rock 'n Roll: Atypical Beneficiary Requests

Megan Brand, Colorado Fund for People with Disabilities
Marco D. Chayet, JD,
Chayet & Danzo, LLC
Peter J. Wall,
Colorado State Bank & Trust

A panel discussion reviewing uncommon beneficiary requests made to trustees, conservators, guardians and agents, Case law, litigation avoidance, drafting tips, decision making tools, and distribution structures will be discussed with perspective provided from three different professional fiduciaries and counsel.

Supported Decision-Making: Practical Tips for Implementation

Morgan K. Whitlatch, JD, National Resource Center for Supported Decision-Making

The NGA has tasked guardians with incorporating supported decision-making principles into their practices to maximize the self-determination of people with disabilities. Through discussion and interactive case studies, this session will provide practical tips on how that goal may be accomplished.

11:15 am – 11:30 am **Break with exhibitors**

11:30 am – 12:45 pm **Concurrent breakout sessions**

Navigating the Bright and Blurry Lines of Ethics in Guardianship and Care Management

Jennifer S. Gormley, MA, JD, LLM,
Law Office of Jennifer S. Gormley

This informative session will focus on NGA's Standards of Practice and Ethical Principles to reinforce a strong foundation for ethical decision making and professionalism in guardianship and care management. Learn an action plan to confront ethical challenges when presented with high-conflict cases or difficult family dynamics. Navigating the ethical balance between confidentiality, communication, decision-making, and substituted judgment is essential. This session will provide tools to reinforce clear ethical boundaries and standards of conduct.

WINGS: State Interdisciplinary Networks Take Flight to Advance Guardianship Goals

Erica Wood,
ABA Commission on Law & Aging
Karolina Abuzyarova, Utah Administrative Office of the Courts
Erica C. R. Costello, JD, NCG
Indiana Supreme Court
Jill Tilbury, Minnesota Department of Human Services

Learn how state courts are partnering with community stakeholders in collaborative Working Interdisciplinary Networks of Guardianship Stakeholders (WINGS) to improve guardianship systems, promote less restrictive options, and prevent and address abuse – and how you can replicate WINGS in your state.

Behaviors Related to Brain Injury: Who Is This Person?

Debbie Coleman,
The Florida Institute for Neurologic Rehabilitation

This session offers an interactive and fun approach to understanding what causes brain injuries, early intervention, behaviors related to brain injury, and more. Participants will also discuss appropriate placement options.

12:45 pm – 1:45 pm **Networking lunch in the hotel's Mountain View Restaurant**

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. Information will be available on the conference website.

2:00 pm – 3:15 pm **Concurrent breakout sessions**

Using Social History to Improve Quality of Care

Scott Greenberg, CAEd, ComForCare Home Care

An interactive discussion surrounding how to develop a social history, apply it to develop a personalized care plan to ultimately ensure those suffering with Alzheimer's or dementia receive the highest quality of care in order to live the best life possible.

Lowering Your Liability When Advising Client Assets

Darryl J. Lynch, Oppenheimer & Co. Inc.
Kimberly M. Edgar, The Bar Plan Surety and Fidelity Company

Join a discussion on reducing fiduciary liability and standardizing your investment management decision-making process. Learn the importance of proper management of clients' assets and your responsibility to comply with the Uniform Prudent Investor Act. Understand the ABC's of bonding, restricting of assets, what underwriters require, the claims process, and techniques for reducing bond costs and exposure to liability. Review the pros and cons of working with an investment advisor.

Scams, Fake News, and Hit Lists: Public Attacks on Guardianship Professionals and Methods To Prevent and Repair Damage

Jennifer S. Gormley, MA, JD, LLM, Law Office of Jennifer S. Gormley
Terry W. Hammond, JD, NCG, Terry W. Hammond Consulting

Guardians and fiduciaries are placed at the highest standard of trust; despite this, some guardians and fiduciaries become exploiters. This reprehensible behavior has caused an outcry for guardianship reform across the country. This panel will discuss legislative changes and reforms, as well as the expanding WINGS program, and how these reforms and programs will provide protection for guardians and people under guardianship. The panel will also explore the trend of hit lists, fake news and scams perpetrated against professionals as tactics to destroy reputations, gain advantages in cases, or to request donations or financial support.

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

3:45 pm – 5:00 pm **Concurrent breakout sessions**

An Examination of the Models of the Offices of Public Guardian

Shannon Alvey, MS, SSW, NMG, State of Utah Office of Public Guardian
Lucille Lyon, MPA, Retired Public Guardian
Michael Handy, BSC, Cabinet for Health and Family Services

Offices of the Public Guardian play important roles in our communities, and these offices' staffs have dramatic impacts on the lives of the people they serve. This panel discussion will include: statutory provisions, target populations with eligibility requirements, the internal organization, direct staff who provide the services to persons placed under guardianship (with sample job descriptions, qualifications, and compensation), and funding. Representatives from public guardian offices in Kentucky, Utah, and California will discuss their states' models, and the current challenges facing these offices.

The Apparently Normal Parent: A Case Study

Christopher G. Scholz, JD Scholz, Loos, Palmer, Seibers, & Duesterhaus LLP

What happens when early signs of Mom's dementia are not recognized by her or the children until a crisis arises? This hypothetical case study explores a wide range of issues in a contested guardianship proceeding when the parent is apparently normal.

Now You Are a Fiduciary. Do You Know Your Obligations and the Rules?

Tamra A. Palmer, JD, Palmer, Goertzel, & Associates P.C.

Fiduciaries are required to prudently take care of money and assets for another person and must use the highest standard of care. In addition to the duty of care, loyalty, and good faith, fiduciaries must carefully follow the powers specifically conferred by the instrument or the court. This program will provide an overview of fiduciary standards and duties, with discussion on developing management plans, establishing budgets, marshalling assets, and having proper documentation. We will explore important topics including: risk assessment, protecting the estate plan, dealing with conflict, liquidating assets, and working with the principal, family, beneficiaries, and professionals.

5:30 pm – 12:00 am **Open evening**

National Conference on Guardianship

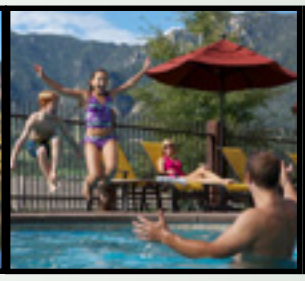
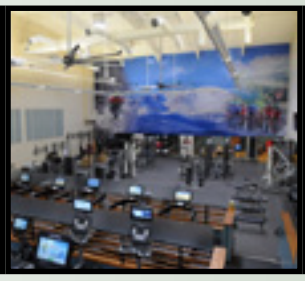
Tuesday, October 17

6:30 am – 8:00 am	**Full buffet breakfast in the hotel's Mountain View Restaurant** **(breakfast is included with your conference registration fee)**
7:00 am – 11:30 am	**Registration area open**
8:15 am – 9:45 am	**Palliative Care, Part One: What Is It, and Why Does It Matter to My Client?** **Chris Ruskey, MD, Interim HealthCare of Southern Colorado** One can hardly pick up a newspaper or journal these days without finding some reference to palliative care. Yet, most of us have only a vague idea about what it is, or how it applies to our roles in clients' lives. Part one of this two-part session will walk participants through the development of palliative care, its philosophy, and client-centered approach. This session will provide an understanding of why insurers, regulators, hospitals, and other large care institutions – and ultimately our clients – deserve, and are coming to expect, the "palliative approach" to care.
9:45 am – 10:00 am	**Break**
10:00 am – 11:30 am	**Palliative Care, Part Two: The Palliative Approach – Practical Integration of Palliative Care with Client Services** **Chris Ruskey, MD, Interim HealthCare of Southern Colorado** In this session, we will explore ways to apply the lessons learned in the previous session to the care of our clients. We will learn what makes an ideal consultant service, when and how to access palliative care, and how to best work with your palliative consultants. Perhaps most importantly, participants will develop their own palliative skills by working through cases designed to enhance their understanding of medical ethics and interdisciplinary approach for the best possible care of clients and their loved ones.
11:30 am	**Conference concludes**

About Cheyenne Mountain Resort

NGA's conference home this year is the gorgeous Cheyenne Mountain Resort in Colorado Springs. If you've ever thought about extending your conference visit, or about bringing your family, this is a wonderful year to do it. Equal parts world-class meeting facility and four-diamond resort, the multifaceted Cheyenne Mountain Resort is a place where the possibilities are as endless as the views.

For the active traveler, there's all-season hiking, tennis, and an immaculate championship Pete Dye-designed golf course. For the family looking for a getaway, the resort's lake and beach provide a perfect place to come together, while the Kidz Club and splash pad offer fun for all ages. Visitors can do all of that without even leaving the resort! Note: Cheyenne Mountain's resort fee has been waived for guests who register in NGA's room block. View the resort's **video** and learn more about the **recreation activities** available at Cheyenne Mountain Resort.

Conference Details

Cheyenne Mountain Resort
3225 Broadmoor Valley Road
Colorado Springs, CO 80906
Phone: 800-588-0250
Book Online

It's time to explore the infinite opportunities for genuine Colorado experiences while immersed in the naturally breathtaking landscape and exceptional hospitality of Cheyenne Mountain Resort. It's all right here:

- 316 guest rooms and suites offer extraordinary mountain vistas
- 200+ scenic acres to explore
- 3 Colorado-inspired dining venues
- An 18-hole Pete Dye designed golf course
- Alluvia Spa & Wellness Retreat
- 17 indoor/outdoor tennis courts & a 9,000 square foot fitness center
- Private 35-acre lake offering both watersports and beach activities
- 5 indoor/outdoor pools

For reservations, visit the reservation website
or
call the hotel's reservations line at 800-588-0250.
You must identify yourself as part of the National Guardianship Association (group code NGA) 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: $169.00, plus local taxes.

NGA cannot guarantee room availability. The discounted group rate concludes on **Thursday, September 21, 2017**. Rooms will be available at the discounted rate until that date, or until the block is filled, whichever comes first. Please be aware that the NGA room block usually ***fills before the deadline***. At that point, you are competing with other guests for rooms. Requests for reservations after September 21 will be accepted by the hotel on a space and rate availability basis. For those making reservations prior to the deadline, rooms may also be available at the group rate on the three days prior to and the three days after the actual conference to accommodate vacation planning.

Transportation from Colorado Springs Airport:
Resort Round Trip Shuttle Service: $40 per person. Email to arrange shuttle transportation by the resort.
Taxi Service: Approximately $26 one way.
Complimentary parking is available on-site.

Continuing Education

This conference program holds a potential of 21.75 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 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 Colorado. Certificate fees apply to receive a legal certificate. Individuals outside of Colorado seeking legal credits should contact their state boards prior to the conference to see if their process requires a legal or a verified certificate. A verified certificate is included with the conference fee.

Social Work Credits

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

Issuing of Certificates

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

Travel & Tourism

Wondering what to do in Colorado Springs? The area offers more than 55 area attractions, including trains, museums, parks, a zoo, and more. You'll find no shortage of things to do in Colorado Springs, where the adventures range from mild to wild! Whether you're looking for outdoor thrills, or educational and cultural activities, fun in Colorado Springs is limitless.

Garden of the Gods

Explore Colorado Springs' paradise in one magical stop. Garden of the Gods Park is a registered National Natural Landmark. Imagine dramatic views, 300' towering sandstone rock formations against a backdrop of snow-capped Pikes Peak and brilliant blue skies. This world-class Visitor & Nature Center and museum is the most visited attraction in the region with all new interactive exhibits.

United States Air Force Adademy

The US Air Force Academy, located north of Colorado Springs, is an institution for the undergraduate education of officers for the United States Air Force, and it is open to visitors daily. Visitors to the Air Force Academy must enter through the North Gate, which can be accessed from Exit 156 on Interstate 25, 14 miles north of downtown Colorado Springs. Chapel tours are given frequently.

Pikes Peak

Rising 8,000 feet above Colorado Springs, Pikes Peak – aka "America's Mountain" – has been beckoning to visitors since the 19th century. Gold brought the pioneers here, but it was the richness of the mountain's natural beauty that motivated them to stay. The views from this pink granite mountain were so stunning, they inspired Katharine Lee Bates to pen the words to the patriotic song, "America the Beautiful." Today, the famous Colorado Gold Rush slogan, "Pikes Peak or Bust," now applies to tourists: Every year, thousands of hikers tackle the climb in search of spectacular photo ops, families get a taste history while riding the Pikes Peak Cog Railway, and stunt-devil wannabees get their fair share of thrills along the winding 19-mile Pikes Peak Highway.

Pikes Peak Cog Railway

Enjoy the invigorating grandeur! Climb to 14,115 feet and experience the magnificent panoramas that inspired the song "America the Beautiful."

Old Colorado City

Sitting just west of the downtown area is Old Colorado City, the original capital of the Colorado Territory. Founded in 1859, this area was once a hotbed of activity, overflowing with farmers, miners, ranchers, and other settlers seeking a piece of their own manifest destiny. In 1917, Colorado City was annexed by a fast-growing new settlement: neighboring Colorado Springs. Although it is no longer its own town, the Old Colorado City Historic District maintains its 19th-century "Wild West" feel with a few modifications: the area's buildings now house locally owned art galleries, quaint shops, and mom-and-pop restaurants.

U. S. Olympic Training Center

This facility in Colorado Springs is the flagship training center of the U.S. Olympic team and the active headquarters of the U.S. Olympic Committee. The Olympic Training Center is able to provide housing, dining, recreational facilities, and other services for up to 557 coaches and athletes at one time. The 35-acre complex houses two Olympic-size swimming pools, as well as practice facilities for a variety of competitive sports, including fencing, gymnastics, weightlifting, and wrestling. In addition to the athletes who live and train here, the center welcomes roughly 130,000 visitors each year and offers 16 guided tours each day during the summer months.

Manitou Springs

Unlike its much larger neighbor, Colorado Springs, this small town in the Rocky Mountain foothills (about 6 miles northwest of central Colorado Springs) has rejected urbanization. Instead, Manitou Springs – now a National Historic District – remains a charming hippie-era haven filled with art galleries, funky boutiques, and outdoor cafes.

Academy Riding Stables

Enjoy the natural splendor and serene landscape of the Garden of the Gods Colorado Springs, Colorado. See this natural wonder as our ancestors did a 100 years ago – on horseback.

Conference Fees

NGA Member Rates

Early Bird Discounted Registration if Received BEFORE September 2

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

Advance Registration if Received BETWEEN September 2 and September 29

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

Regular Registration if Received AFTER September 29

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

Family Guardian Single-Day Fee

(applies to members and non-members; valid for one day only)

Sunday or Monday $50

(includes sessions, exhibits, and food functions until 5:00 pm)

NGA Non-Member Rates

Early Bird Discounted Registration if Received BEFORE September 2

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

Advance Registration if Received BETWEEN September 2 and September 29

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

Regular Registration if Received AFTER September 29

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

Not an NGA Member? Join Now and Pay Member Rates!

Individual Membership	$180
Organization Membership* first employee	$260
Organization Membership* additional employee	$110
Family, Volunteer, or Retired Membership	$60

Information About Conference Fees

Registration for the Saturday Conference Intensives: *Legal and Legislative Review, Guardianship Clinic*, or *Organizing and Managing Your Firm Through Document Management* requires an additional fee. Payment covers one of these sessions. Registrants may only attend/receive the materials for the session for which they register and pay. Main conference handouts are not included in this fee.

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

Breakfast for this conference is served in the hotel's restaurant, and your name badge provides access to this breakfast. Guests can pay out of pocket to join a conference attendee for breakfast.

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

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

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

NGA Registration Form: 2017 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 1 for the early bird discount.
Late registration fees apply after September 29.

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 _____

Email (Confirmations are only sent by email.) _____

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

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

2017 Conference Registration

Registration fees are available on the previous page.

Early bird registration if received BEFORE September 2

	NGA Member	Non-Member
Full Conference	$_____	$_____
Sunday or Monday only	$_____	$_____
Tuesday only	$_____	$_____
Intensive: Legal & Legislative Review	$_____	$_____
Intensive: Document Management	$_____	$_____
Intensive: Guardianship Clinic	$_____	$_____

Advance registration BETWEEN September 2 and September 29

	NGA Member	Non-Member
Full Conference	$_____	$_____
Sunday or Monday only	$_____	$_____
Tuesday only	$_____	$_____
Intensive: Legal & Legislative Review	$_____	$_____
Intensive: Document Management	$_____	$_____
Intensive: Guardianship Clinic	$_____	$_____

Regular registration if received AFTER September 29

	NGA Member	Non-Member
Full Conference	$_____	$_____
Sunday or Monday only	$_____	$_____
Tuesday only	$_____	$_____
Intensive: Legal & Legislative Review	$_____	$_____
Intensive: Document Management	$_____	$_____
Intensive: Guardianship Clinic	$_____	$_____

Additional Registration Options

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

Total for Conference Registration: **$_____**

Registration Payment (Federal ID # 36-3591860)

❒ Please email me a receipt for my records.

Pay with credit card online at www.guardianship.org.

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

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

Credit Card: ❒ Visa ❒ MasterCard

Name on Card (print) _____

Account Number _____

Expiration Date _____ Security Code _____

Signature _____

No refunds will be issued after Monday, October 2. Cancellations after October 2 will receive a copy of materials from the conference.
Changes or cancellations must be made in writing to Terri Breon at registration@guardianship.org. Substitutions may be made in advance.

Certificate of Attendance Order Form

NGA Conference on Guardianship
October 14 – 17, 2017
Colorado Springs, CO

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

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

☑	Certificate Type	Certificate Use	Fee for Certificate
	Guardianship	**Only** Florida or Washington (All other guardianship areas accept the verified certificate already provided.)	$25.00
	Legal	Used for Colorado (or any other state that accepts Colorado's approval)	$50.00
	Social Work	Certificate may be used for all states accepting NASW approval	$50.00

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

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

Name _____

Email _____Phone _____

Company _____

Address_____

City _____ State _____ Zip Code _____

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

_____ Visa _____ MasterCard

Card # _____ Sec. Code _____ Exp. Date _____

Name on Card _____

Signature _____

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

NATIONAL GUARDIANSHIP ASSOCIATION