NATIONAL GUARDIANSHIP ASSOCIATION

2016 National Conference on Guardianship

Charleston, South Carolina

Weaving a **STRONG** *Guardianship Community*

October 29 – November 1, 2016

Embassy Suites by Hilton Airport Hotel & Convention Center

Conference Schedule at a Glance

(Conference intensives require separate registration.)

Saturday, October 29

7:00 am – 5:00 pm	Registration area open
8:00 am – 11:30 am	Conference intensive: **Identifying Skilled, Ethical Investment Advisors & Monitoring the Prudence of Their Investment Practices**
8:30 am – 4:00 pm	Conference intensive: **Legal Review**
11:30 am – 12:30 pm	Lunch on your own
12:30 pm – 4:00 pm	Conference intensive: **Guardianship Litigation**
3:30 pm – 5:30 pm	State Affiliates meeting
5:30 pm – 6:30 pm	Welcome reception with live shag dancing entertainment

Sunday, October 30

7:00 am – 5:00 pm	Registration area open
7:30 am – 8:15 am	New member breakfast
8:15 am – 8:30 am	Welcome/opening remarks
8:30 am – 10:00 am	**Changes Coming to the Uniform Guardianship Act**
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 – 3:15 pm	Break with exhibitors
3:15 pm – 4:30 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 31

7:00 am – 5:00 pm	Registration area open
8:15 am – 9:30 am	**The Ten Commandments of an Ethical Guardianship Practice**
9:30 am – 9:45 am	Break with exhibitors
9:45 am – 11:00 am	Concurrent breakout sessions
11:00 am – 11:15 am	Break with exhibitors
11:15 am – 12:30 pm	Concurrent breakout sessions
12:30 pm – 1:45 pm	Networking luncheon and dessert with exhibitors
1:45 pm – 3:00 pm	Concurrent breakout sessions
3:00 pm – 3:15 pm	Break
3:15 pm – 4:15 pm	Concurrent breakout sessions
4:15 pm – 4:30 pm	Break
4:30 pm – 5:30 pm	Concurrent breakout sessions
5:30 pm	Open evening with dine-around and transportation downtown

Tuesday, November 1

7:00 am – 11:30 am	Registration area open
8:15 am – 9:45 am	**Combating the Crime of the 21st Century: Elder Financial Abuse and Security**
9:45 am – 10:00 am	Break
10:00 am – 11:30 am	**Managing the Message: How to Plan for Better Media Outcomes**
11:30 am	Conference concludes

Conference Schedule

2016 National Conference on Guardianship

October 29 – November 1, 2016 • Embassy Suites Airport Hotel & Convention Center • Charleston, SC

Conference Intensives on Saturday, October 29

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

8:00 am – 11:30 am — **Identifying Skilled, Ethical Investment Advisors and Monitoring the Prudence of Their Investment Practices**

Ted Ong, Prudent Investors Network

Fiduciaries are frequently tasked with managing the investment assets of protected persons – and are potentially liable for the mismanagement thereof. Yet few fiduciaries have a background in investment management, so they need to delegate that responsibility to a financial advisor. Unfortunately, without the background, many feel inadequate to the task of competently evaluating either the investment expertise of an investment advisor, or of recognizing unethical practices. This class will prepare you to fulfil that responsibility with confidence and protect yourself from potential liability related to your investment portfolios.

A white paper will be sent to you prior to the class that will introduce you to the concepts to be mastered in the class. The in-person portion of the class will consist of 1) a review of the principles and oversight tools learned from the white paper and 2) hands-on case studies that will give you the confidence needed to apply, in your own practice, what you will learn in the class. Prospective students should understand that one does not master the principles of investing in a half-day class. The white paper is the basis of this class and will provide you a foundation in the principles you will then be able to fully grasp through the hands-on activities in the class. It should therefore be studied prior to attending. A perfect understanding of the white paper is not necessary; a familiarity with the principles therein is a prerequisite however.

As an added benefit, students who sign up for the class will be invited to send the presenters a portfolio – if they would like one evaluated in the class as a case study (anonymously of course). Sending a portfolio is purely optional, however.

8:30 am – 4:00 pm — **Legal and Legislative Review**

Steven D. Fields, Esq., Tarrant County Probate Court Two
Terry W. Hammond, Esq., Terry W. Hammond & Associates
Sally Hurme, JD
Robert A. McLeod, Esq., Briggs & Morgan, PA
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.

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

12:30 pm – 4:00 pm — **Guardianship Litigation**

David L. McGuffey, Elder Law Practice of David L. McGuffey
Catherine Anne Seal, Kirtland & Seal, LLC

This is in interactive course. Using video from a mock trial, two experienced litigators will guide a discussion, addressing issues such as: preparing your witnesses for trial, use of expert witnesses, objections (when to use them and how to present them), and court room strategy. During the program, we will explore what you should anticipate from opposing counsel and how you should respond in court. Video segments include the petitioner, caveator (or counter-petitioner), opposing medical experts, lay witnesses, and a financial expert. The issues presented in this mock trial include capacity of the person under guardianship and whether a limited guardianship is appropriate, identification of the most appropriate guardian, and financial abuse. This course will help you consider issues presented in contested cases and how to frame your next case for success.

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Saturday, October 29

3:30 pm – 5:30 pm — **State Affiliates meeting (invitation only)**

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

Sunday, October 30

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

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

8:15 am – 8:30 am — **Welcome/opening remarks**
Wanda Bevington, 2016 Conference Chair

8:30 am – 10:00 am — **Changes Coming to the Uniform Guardianship Act**
David English, University of Missouri
Sally Hurme, JD
Nina Kohn, Syracuse University College of Law
Erica Wood, Esq., American Bar Association Commission on Law and Aging

Learn about proposed changes to the Uniform Guardianship and Protective Proceedings Act (UGPPA) that incorporate recommendations from the 3rd National Guardianship Summit, including person-centered planning, limited guardianship, legal representation, fees, and much more.

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

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

Lessons Learned from the Life and Death of a Loved One: What Amelia's Passing Taught Me

Ted Ong, Prudent Investors Network
Kitty Baughan Cole, Retired Marriage and Family Counselor/Volunteer

While Ted and Amelia Ong had a wonderful life, their lives together developed new purpose and meaning with Amelia's diagnosis of pancreatic cancer in January 2013. While Ted and Amelia had learned much through years of attending fiduciary conference presentations, the gap between awareness and application was huge.

Enhancing Communication with People Living with Alzheimer's Disease and Dementia

Wendy Wells-Chanampa, Senior Resource Consultants, Inc.

Communicating with people with dementia and Alzheimer's disease is key to enhancing relationships and understanding their perspectives. In this interactive presentation, new skills will be taught and practiced; participants will learn to approach and connect with people at all stages of dementia.

The Plan of Care: Increasing Client Satisfaction, Reducing Liability, and Managing Expectations

Dan Stubbs, Stubbs & Associates
Mary Winners, About Senior Solutions

A plan of care is an essential tool for every guardianship. Not all guardians have the background or knowledge to create a sound plan beyond the legal requirements. Think about it: you are in charge of another person's life! Using the expertise of both a gerontologist and a seasoned fiduciary together will provide you with solutions to increase the quality of life for your clients and take the guesswork out of a difficult component of your role.

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

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

Planning a Graceful Exit Strategy
Irene Rausch, NMG, The PLAN, Inc.

Guardians retire and guardians die. This session will provide organizational tips and forms to help guardians make a graceful exit.

NGA Standards: Ethical Business Practices
Russ Marshall, Marshall Fiduciary Services

The NGA Standards of Practice will be discussed and related to everyday business practices and ethical decisions.

Tax-Wise Planning: Funding Special Needs Trusts with IRAs
Stephen Dale, The Dale Law Firm
Robert Fleming, Fleming & Curti

This presentation will focus on the benefits of using a team approach when creating and managing a special needs trust, including discussion of important elements of a trust. Strategies on managing the trust in a tax-efficient manner will be reviewed.

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

3:15 pm – 4:30 pm **Concurrent breakout sessions**

Analyzing Guardianship: A Look at Model Programs for Data Tracking Around the Country
Jeff Rinard, Texas Office of Court Administration
Raquel Malina Romanick, JD, Brookdale Center for Healthy Aging of Hunter College/CUNY

Representatives from New York and Texas will discuss studies and model programs that are focused on understanding their statewide guardianship systems. Using data and case studies, they will also discuss the challenges they face with regard to tracking cases, complying with monitoring, and assessing the needs in their states.

Legal Liability Issues for Guardians
David Strachman, McIntyre Tate LLP

This presentation will explore the multitude of legal liability issues associated with serving as guardian, including: tort matters, contract liability, and fiduciary duties. We will discuss ways to prevent incurring liability and best practices to avoid legal entanglements.

Volunteer Guardianship: The Keys to Successfully Develop, Recruit, and Retain Dedicated Volunteers
Gizelle Jones, Jewish Family Service
J.J. Mesko-Kimmich, Jewish Family Service

Participants will learn how to build successful volunteer guardian programs. This includes community assessment, collaboration, and program development. The presenters will focus on implementation techniques, including marketing and recruitment, volunteer support, and retention.

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

7:00 pm **Dinner on your own**

Monday, October 31

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

8:15 am – 9:30 am **The Ten Commandments of an Ethical Guardianship Practice**
Roberta Flowers, Stetson College of Law

Guardianship has many very thorny and unique ethical issues for guardians. This interactive program will utilize problems with audience responders to explore the ethical issues surrounding a guardianship practice.

9:30 am – 9:45 am **Break with exhibitors**

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9:45 am – 11:00 am **Concurrent breakout sessions**

Wish You Were Here: Reflections on the 4th World Congress

Wanda Bevington, Personal Guardianship Services
Kim Grier, Georgia Division of Aging Services
Sally Hurme, JD
Frank Johns, Booth, Harrington & Johns of North Carolina PLLC

Germany is the host country for the 4th World Congress in September. Get the highlights of what's going on around the world in guardianship, as shared by a panel of Congress participants. The panelists will share best practices learned from our international colleagues who are addressing many of the same complex issues we face in the US.

Capacity and Undue Influence: Where the Two Collide

Janet Morris, Bet Tzedek
Yolande Erickson, Bet Tzedek

Financial elder abuse is a growing problem in society. Even though a senior has capacity, he or she can still be vulnerable to savvy abusers who can use undue influence to get him/her to write a check or invest in a scam. How do police, district attorneys, and civil attorneys use new laws to prosecute and protect seniors?

Providing Access to Care for the Legally Incapacitated

Mary O'Keefe, University of Texas at Galveston School of Nursing

This presentation discusses an inter-professional partnership (model) involving teams of inter-professional students partnering with the probate courts in a community service project designed to provide access to care for people who are legally incapacitated. Health care students were trained to collaborate with guardians and people who are legally incapacitated regarding patient-centered care, and file a Guardianship Court Visitor Report with the probate court regarding access to care. This model received the 2012 Innovations in Professional Nursing Education Award from the American Association of Colleges of Nursing, subsequently cited by the Texas courts as a groundbreaking inter-professional collaboration with the legal system that provided the legally incapacitated with access to care.

11:00 am – 11:15 am **Break with exhibitors**

11:15 am – 12:30 pm **Concurrent breakout sessions**

Nuts and Bolts of Guardianship

Robert Julio Dixon, Sentinel Care

Starting a guardianship practice can be overwhelming. Done correctly, business acumen will lead to success in service. This session focuses on guardianship practice from A to Z. Participants will learn how to jump-start a guardianship practice from "lead" to "discharge." We will identify resources, discuss marketing tips, learn how to finance a start-up, discuss how to work with governing authorities, and share best office practices.

Using SNTs to Protect Benefits

Linda Beiler, Secured Futures
Barb Helm, Arcare, Inc.

The speakers will address the use of special needs trusts, including stand-alone SNTs and pooled trusts, which provide mechanisms for SSI/Medicaid recipients to place excess resources, legal settlements, back SSA payments, and inheritances, in a trust. This allows people to maintain eligibility for SSI, Medicaid, HCBS, and other types of funding.

Fraud in Guardianships

Sharon Bock, Clerk & Comptroller, Palm Beach County
Anthony Palmieri, Clerk & Comptroller, Palm Beach County

Understanding and monitoring guardianship fraud is critical to protecting society's most vulnerable citizens. The clerk & comptroller of Palm Beach County (Florida) and her inspector general perform highly specialized audits and investigation of guardianships. Since inception, the clerk's program has audited and investigated over 900 guardianship cases and identified over $4.5 million worth of unsubstantiated disbursements, missing assets and fraud.

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.

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12:30 pm – 1:45 pm **Networking luncheon and dessert with exhibitors**

1:45 pm – 3:00 pm **Concurrent breakout sessions**

Advocating for Proper Professional Staff in Home Care Services

Scott Greenberg, ComForcare

Accepting help in the home can be overwhelming for many people. This session will help you identify when help is needed, learn how to hire the proper caregiver, determine what characteristics you should be looking for, and understand the specific needs of dementia patients. Scott will also discuss new regulations, risks associated with hiring independent contractors, and home care alternatives.

The Worst Investment Mistakes that Guardians Make: How to Spot Them and How to Avoid Them

George Guererro, True Link Financial
Kai Stinchcombe, True Link Financial

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.

The Changing Climate of Professional Guardianship

Gerald Hemness, Law Office of Emma Hemness, PA

Join our presenter for a candid discussion regarding the changing climate of professional guardianship in many jurisdictions, focusing on: the scope of a guardian's duties, working with the court, interacting with third parties, guardian compensation, and being active with your local legislature.

3:00 pm – 3:15 pm **Break**

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

The Power of Music: Integrating Technology into Person-Centered Care

Wanda Bevington, NCG, MS, LSW, Personal Guardianship Services
James Schmidt, LSW, LNHA, Atlas Health Solutions

Through the increased use of technology and the use of a multidimensional, person-centered approach, we can create opportunities to enhance the care and quality of life provided in nursing homes. This multidimensional approach will use enhanced training, focused on utilizing individualized interventions and expanded comprehensive activity programing, to include the use of current technologies, personalized music programs, and partnering with the community, local businesses and educational institutions. In doing so, the individuals we serve can connect with such things as the music they have loved, with the goal of improving their overall health and well-being while enhancing the quality of their lives.

South Carolina Vulnerable Adult Guardian ad Litem Volunteer Program

Sarah Pace, SC Vulnerable Adult Guardian ad Litem Program
Maria Patton, SC Vulnerable Adult Guardian ad Litem Program
Brenda Stalzer, SC Vulnerable Adult Guardian ad Litem Program

In South Carolina, guardians ad litem are appointed by a judge to recommend the best interests of vulnerable adults who have been abused, neglected or exploited and who are in the custody of the SC Department of Social Services. In this session, you will learn how this program model was developed and how it could be implemented in other settings or in other states. You will also learn about the role of a guardian ad litem within the court system, and also about the challenges and successes of using volunteers as guardians ad litem.

Behaviors Related to Brain Injury

Debbie Coleman, Florida Institute for Neurologic Rehabilitation, Inc.

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.

4:15 pm – 4:30 pm **Break**

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

Building Blocks of Guardianship: Building up Your Clients, Your Teams, and Your Business

Shannon Butler, Lutheran Social Service of Minnesota

Join this guided interactive session to learn the tips and techniques to increase your effectiveness with clients, develop a strong team approach, and set your guardianship business apart as a quality provider. You will come away with ideas to refresh your quality of service and renew your perspective and your approach, even with the toughest clients and teams.

Working Together to Promote Self-Determination

Nicole Jorwic, The Arc of the United States
Robin Shaffert, The Arc of the United States

Join advocates from The Arc in an interactive session exploring how guardians, people with disabilities, and advocates can work together to support self-determination, build decision-making capacity, and ensure best practices to avoid abuse and conflicts of interest.

Empowering Caregivers Through Structured Dementia Education: Dementia Dialogues

Macie Smith, University of South Carolina, Office for the Study of Aging

Caregiving is the backbone to successful aging in America. With more than 700,000 South Carolinians providing care for older adults with cognitive and physical impairments, it is imperative that successful tools of caregiving are provided. Education is one of these tools.

5:30 pm **Open evening and downtown dine-around with bus transportation**

Tuesday, November 1

7:00 am – 11:30 am **Registration area open**

8:15 am – 9:45 am **Combating the Crime of the 21st Century: Elder Financial Abuse and Security**

Julie M. Krawczuk, MAM, The Senior Source
Brenda Hull Thompson, The Dallas County Probate Court
Stephanie Martin, Dallas County District Attorney's Office

The Elder Financial Safety Center is a unique, first of its kind center, designed to address all aspects of an older adult's financial security. We help older adults avoid the dangers of financial uncertainty and exploitation by offering prevention, protection, and prosecution services through a collaborative model made up of The Senior Source (social services agency), Dallas County Probate Courts, and the District Attorney's office in Dallas County. Learn about our $40 million impact on Dallas since May 2014, and find out how your community can do the same.

9:45 am – 10:00 am **Break**

10:00 am – 11:30 am **Managing the Message: How to Plan for Better Media Outcomes**

Elizabeth Boineau, E. Boineau & Company

Whether you're called directly to respond to a media inquiry or not, negative stories about guardians in your community can affect the image and reputation of your organization. Even when the story isn't about you, you can start to face increased scrutiny and sometimes probing questions from the media and the public. This sort of coverage may even lead to changes in legislation. Elizabeth Boineau, founder and owner of Charleston-based strategic marketing and public relations firm, E. Boineau & Company, will share lessons she's learned during her 35-year career in marketing, media strategy, and crisis communications. Through her presentation, she'll answer questions such as:

- How can guardians address these issues proactively before they become negative stories or before legislation is introduced?
- How do you get media to cover the more positive stories?
- How should you respond to stories that have inaccurate information or misrepresented facts?
- How would you address a case without violating confidentiality?
- How can you develop a positive relationship in the media world?

11:30 am **Conference concludes**

Conference Details

Embassy Suites Airport Hotel & Convention Center
5055 International Blvd.
North Charleston, SC 29418
Phone: 843-747-1882
Book Online or Call 800-EMBASSY

Enjoy a convenient location and walk to more than 30 restaurants in the local neighborhood. This Charleston, SC hotel is adjacent to the North Charleston Coliseum & Performing Arts Center, making it ideal for attending an event.

Get your day off to a great start with a free made-to-order breakfast each morning, and wind down in the evenings at the complimentary evening reception with drinks and snacks. Get to work at the 24-hour BusinessLink™ Business Center with complimentary printing. Take a swim in the indoor pool or enjoy an invigorating workout in the complimentary fitness center.

Two-room suites offer more space for living and working. Each suite features a separate living room and bedroom, two flat-screen TVs, a work desk, refrigerator and microwave.

For reservations, visit the reservation website
or
call the hotel's reservations line at 800-EMBASSY.
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 **Friday, September 23, 2016**. 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 23 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 hotel offers complimentary shuttle service. 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 South Carolina. Certificate fees apply to receive a legal certificate. Individuals outside of South Carolina 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.

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 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

Charleston offers adventures of historic proportions!

Stand on the site of the first shot in the Civil War in the morning, come face to face with a giant sea turtle in the afternoon, and tour an antebellum mansion or climb aboard a WWII aircraft carrier in the evening! There are so many blossoming gardens, so many photo opportunities, and so many reasons to want to explore the city.

Condé Nast Traveler readers voted Charleston, South Carolina, the number one city in the United States for three years in a row. **This article** explores the new Charleston vs. the old Charleston and describes the spirit of the city.

The following are some of Charleston's most popular destinations. They may not all be open on NGA's open evening on Monday, so plan to come early or stay late to experience the Holy City.

Cobblestone streets are more fun to explore on a carriage. Catch a carriage tour to really learn about Charleston's history, Colonial style. Hear hundreds of years of history set against the sound of hoofbeats. The carriage tour guides are some of the best in Charleston for rich storytelling and cracking a joke or two.

If the carriage isn't your cup of sweet tea, lace up your best walking shoes! They say you need to walk a mile in someone else's shoes to see where they are coming from. Take a stroll through cobblestone streets and hear all the stories they have to tell at the same time on a walking tour. Tours range from the general overviews to specific-interest, including ghost tours, culinary tours, history tours, architecture tours, pirate tours, and much more!

Stand on the ground where America's deadliest war began at Fort Sumter National Monument. The first shots were fired here, igniting a conflict that saw more than 700,000 casualties. Experience a feeling of patriotic pride while a National Park Ranger brings each feature to life, evoking images of mortar shells and cannonfire. Your tour vessel will cruise to Fort Sumter from Liberty Square in downtown Charleston or from Patriot's Point in Mount Pleasant.

Tour the homes and gardens of the families who shaped Charleston. Choose from the Calhoun Mansion, Charleston's largest private home and house museum, the Nathaniel Russell House with its restored interior and period antiques, the Aiken-Rhett House, the city's most intact Antebellum urban complex, the Heyward-Washington House, Charleston's Revolutionary War house, or Drayton Hall, America's oldest unrestored plantation house, to name just a few.

Built in 1841 to sell produce and meats, the Charleston City Market features small shops, restaurants, and flea market with everything from produce to antiques. Find the weavers of sweetgrass baskets, one of the oldest handcrafts of African origin in the United States. Made in Charleston from indigenous bulrush, a strong yet supple grass that thrives in the sandy soil of the coastal region, sweetgrass baskets are now among the nation's most prized cultural souvenirs.

Take a beach break before or after NGA's conference and hit the water! If you ask a Charlestonian which beach is his/her favorite, you'll probably get a different answer every time. That's because Charleston is surrounded by several gorgeous beaches. Catch a wave at Folly Beach, build sandcastles at Isle of Palms and watch the sun set behind Sullivan's Island's iconic lighthouse.

Charleston's #1 family attraction is the South Carolina Aquarium! Come face-to-face with more than 5,000 amazing animals. Touch sharks and rays, experience a 4-D movie and tour the Sea Turtle Hospital.

Conference Fees

NGA Member Rates

Early Bird Discounted Registration if Received BEFORE September 17

Full Conference	$385
Sunday or Monday only	$180
Tuesday only	$80
Intensive: Legal & Legislative Review	$130
Intensive: Half-Day (each)	$80

Advance Registration if Received BETWEEN September 17 and October 14

Full Conference	$425
Sunday or Monday only	$195
Tuesday only	$95
Intensive: Legal & Legislative Review	$155
Intensive: Half-Day (each)	$105

Regular Registration if Received AFTER October 14

Full Conference	$500
Sunday or Monday only	$220
Tuesday only	$120
Intensive: Legal & Legislative Review	$180
Intensive: Half-Day (each)	$130

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 17

Full Conference	$555
Sunday or Monday only	$255
Tuesday only	$95
Intensive: Legal & Legislative Review	$155
Intensive: Half-Day (each)	$105

Advance Registration if Received BETWEEN September 17 and October 14

Full Conference	$600
Sunday or Monday only	$270
Tuesday only	$120
Intensive: Legal & Legislative Review	$180
Intensive: Half-Day (each)	$130

Regular Registration if Received AFTER October 14

Full Conference	$675
Sunday or Monday only	$295
Tuesday only	$145
Intensive: Legal & Legislative Review	$205
Intensive: Half-Day (each)	$155

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, Identifying Skilled, Ethical Investment Advisors & Monitoring the Prudence of Their Investment Practices*, or *Guardianship Litigation* 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; group lunches on Sunday and Monday; all breaks, as well as the conference handouts.

Breakfast is not provided for this conference, as hotel guests have access to a full breakfast in the hotel. Non-hotel guests may purchase this breakfast for $9.95 per person.

Early bird and advance registration discounts were added this year 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: 2016 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 16 for the early bird discount.
Additional fees apply after October 14.

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 conference. Please contact me.

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

2016 Conference Registration

Registration fees are available on the previous page.

Early bird registration if received BEFORE September 17

	NGA Member	Non-Member
Full Conference	$_____	$_____
Sunday or Monday only	$_____	$_____
Tuesday only	$_____	$_____
Intensive: Legal & Legislative Review	$_____	$_____
Intensive: Investment Advisors	$_____	$_____
Intensive: Guardianship Litigation	$_____	$_____

Advance registration BETWEEN September 17 and October 14

	NGA Member	Non-Member
Full Conference	$_____	$_____
Sunday or Monday only	$_____	$_____
Tuesday only	$_____	$_____
Intensive: Legal & Legislative Review	$_____	$_____
Intensive: Investment Advisors	$_____	$_____
Intensive: Guardianship Litigation	$_____	$_____

Regular registration if received AFTER October 14

	NGA Member	Non-Member
Full Conference	$_____	$_____
Sunday or Monday only	$_____	$_____
Tuesday only	$_____	$_____
Intensive: Legal & Legislative Review	$_____	$_____
Intensive: Investment Advisors	$_____	$_____
Intensive: Guardianship Litigation	$_____	$_____

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 17. Cancellations after October 17 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 29 – November 1, 2016
Charleston, SC

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 South Carolina (or any other state that accepts South Carolina's 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.

NATIONAL GUARDIANSHIP ASSOCIATION