NGA
NATIONAL GUARDIANSHIP ASSOCIATION

National Conference on Guardianship

October 12 – 15, 2019

Griffin Gate Marriott
Lexington, Kentucky

Racing to Excellence

Welcome to the National Guardianship Association's 2019 National Conference on Guardianship. This year's program again features outstanding presentations that will appeal to professional and family guardians, public and private guardians, and participants at every level of experience.

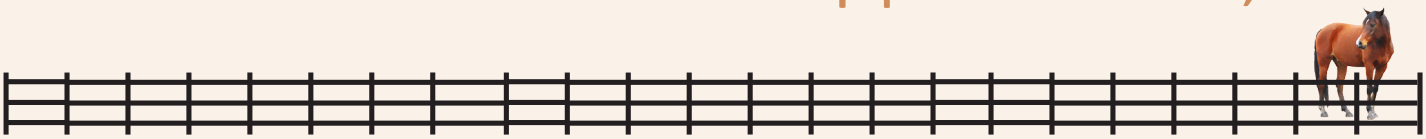
In addition to an exceptional array of breakout sessions, our five general sessions feature distinguished presenters, including former San Diego Deputy District Attorney Paul Greenwood (back by popular demand!) Participants will also hear from University of Kentucky's own Dr. Gregory Jicha, who will discuss brain function, memory, and judgement. New this year is a virtual reality experience, where participants will experience the end of life through a patient's eyes. And plan to stay through the end of the conference on Tuesday as our final general sessions will discuss eldercaring coordination, a less-restrictive alternative to guardianship, and special needs trust planning. You will also want to consider arriving early to attend one of the optional conference intensives: the full-day Legal & Legislative Review, or the half-day sessions.

Our conference hotel is located in the beautiful countryside of Lexington, and transportation into the downtown area will be provided each night. Races will be happening at Keeneland Race Course, and we encourage you to add some time at the beginning and end of the conference to explore this scenic and interesting area of the country. As usual, we will hold a silent and a live auction, host a dine-around, and offer multiple networking opportunities. This brochure contains complete information about our general and concurrent sessions, our conference intensives, hotel information, and much more to get you "chomping at the bit" to register. We look forward to welcoming you to our conference in October!

www.guardianship.org | 877-326-5992 | registration@guardianship.org

Saturday Conference Intensives

National Conference on Guardianship | October 12 – 15, 2019



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 **Lawyers, Guns, and Money: The Legal Ins and Outs of Dealing with Difficult People and Assets**

Frank R. Acuña | Acuña Regli

Guardianship is more than taking care of a person or estate. There will be difficult people, difficult professionals, and difficult assets encountered along the way. This class is like the *Jeopardy!* category, "Hodge Podge." We will examine some of a guardian's toughest situations, and the creative (legal) ways that guardians have addressed them. Topics include:

- Dealing with other professionals, such as attorneys and real estate agents.
- The importance of an investment plan and care plan, and best practices for creating and maintaining them.
- Guns, pets, digital assets, and more!
- Real estate best practices… and pitfalls to avoid.
- Subtrust funding in a post-TCJA era, and what to do with ancient or unfunded "B" trusts.
- Malpractice insurance and the hidden traps in the fine print.

8:15 am – 11:30 pm **Legal and Legislative Review, Part 1**
12:45 pm – 4:00 pm **Legal and Legislative Review, Part 2**

Steven D. Fields, JD | Tarrant County Probate Court Two
Terry W. Hammond, JD, NCG | Texas Guardianship Association
Sally Balch Hurme, JD | Sally Balch Hurme LLC
Arin Norris, JD, NMG | Lutheran Services Florida
Dari Pogach, JD | ABA Commission on Law and Aging
Ira Salzman, JD | Goldfarb Abrandt Salzman & Kutzin, LLP

A panel of legal guardianship 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.

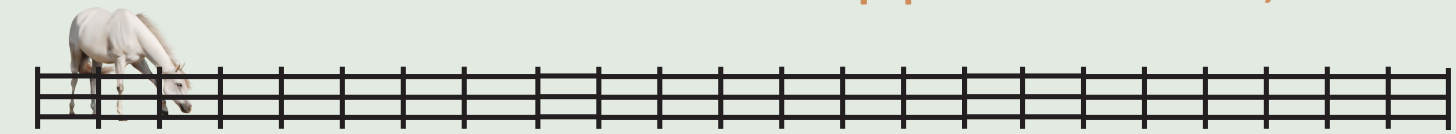
12:45 pm – 4:00 pm **Boots on the Ground: Guardianship Clinic**

Helen Ferarro-Zaffram, JD | Center for Elder Law & Justice
Bradley Loliger, Esq. | Center for Elder Law & Justice
Lisa Wawrzonek, MS | Alaska Court System

Attendees of this session will engage in a group discussion, and walk through hypotheticals of some typical and not-so-typical guardianship cases. There will be a great deal of interaction and sharing of ideas, so that attendees can learn from the presenters – and each other – about the best ways to help those who need a guardian.

Conference Schedule

National Conference on Guardianship | October 12 – 15, 2019



Saturday, October 12

4:00 pm – 5:30 pm — **State Affiliates Meeting**

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

Join your fellow conference participants at the Mansion at Griffin Gate to experience some Kentucky-style southern hospitality. The mansion was originally built more than 160 years ago, and has been rebuilt and remodeled multiple times since. According to the owners, The Mansion still has a few permanent residents, who stop by occasionally to turn off fireplaces and lights, making their presence known.

Sunday, October 13

7:00 am – 5:30 pm — **Registration Area Open**

7:15 am – 8:20 am — **Breakfast**

7:15 am – 8:15 am — **New Member Breakfast**

8:20 am – 8:30 am — **Welcome and Opening Remarks**
Jeff Ohlson, 2019 Conference Chair

8:30 am – 10:00 am — **Guardianship Abuse: Dealing with the Fallout from the April Parks Case**
Paul R. Greenwood | Retired Deputy District Attorney, San Diego District Attorney's Office

In January 2019, April Parks, a long-time professional guardian was, along with two co-defendants, sentenced in a Las Vegas courtroom to a lengthy prison term after pleading guilty to elder exploitation, theft, and perjury. Her story has prompted discussions all over the country as to whether there are others like her working as guardians in our communities. This presentation will look at her case, and will discuss lessons to be learned and what can be done to prevent another similar situation.

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

10:30 am – 11:45 am — **Concurrent Breakout Sessions**

Addressing Problematic Behavior with Clients in Care Facilities

Joyce Meckna, CCM, CM
Advocate Care Services

Behavior can change for a variety of reasons, and "barring the door" is a real problem for residents with behavior issues in care facilities. Early identification and intervention are key components to a healthy and productive home environment for a person under guardianship. When they are in a community residential setting, behavior problems can present a dilemma for all involved. In this session, we will address working with facilities to intervene and preserve the living situation.

This session will be repeated at 3:00 pm.

Solving Ethical Dilemmas Using NGA's Standards of Practice

Irene Rausch, NMG
Professional Guardian

Professional guardians are often faced with making difficult decisions for people under guardianship and may encounter ethical dilemmas that complicate the decision. This session will present case studies that include a variety of situations that include end of life decisions, financial management, placement issues, and case management. Appropriate NGA Standards of Practice will be reviewed and incorporated into the decision-making process.

Advanced Interview Skills: Creating Models of Effective Communication and Removing Obstacles of Understanding

Yolande P. Erickson, Esq.
Bet Tzedek Legal Services
Bertha S. Hayden, Esq.
Bet Tzedek Legal Services

As professionals or lay persons working with someone challenged by impairment, it's imperative that we employ interview models that help us fully engage with the individuals we aim to assist. This session will begin with a case study that includes helping clients execute Powers of Attorney and/or Medical Advance Directives. The session will then transition to identifying challenging topics faced by guardians, and discuss ways to work together to create an interview model to address the challenge. Attendees will leave the session with new tools to promote levels of understanding and effective communication.

National Conference on Guardianship

11:45 am – 1:15 pm **Lunch and Annual Meeting**

1:15 pm – 1:30 pm **Break with Exhibitors**

1:30 pm – 2:45 pm **Concurrent Breakout Sessions**

Sexual Abuse and Long-Term Care

Sherry Culp, CSW
Nursing Home Ombudsman Agency of the Bluegrass
Jodi Holsclaw, MSW
Nursing Home Ombudsman Agency of the Bluegrass

Aging and disabled long-term care residents are very vulnerable to sexual assault. Increased discussion about sexual assault in our society has given opportunity for ombudsmen and other advocates to learn more about how to detect and prevent sexual assault. This session will inform advocates about the increased risks and types of assault. Additionally, they will learn how to detect and appropriately respond to prevent further assault.

Are You Covered? Risk Management and Errors & Omissions Insurance for Professional Fiduciaries

Andrew R. Jones, Esq.
Furman Kornfeld & Brennan LLP
Lawrence Hilton
Dominion Insurance Services, Inc.

This presentation will help professional fiduciaries: avoid claims and disputes, ensure they are covered by insurance as part of a claim, and navigate the claim handling/professional liability insurance process.

Using Supported Decision-Making in Kentucky

Laura N. Butler, MRC
University of Kentucky Human Development Institute
Camille Collins, M.P.H.
Kentucky Protection & Advocacy

Kentucky Protection & Advocacy and the University of Kentucky Human Development Institute provided legal advocacy and education for individuals wanting to have their rights restored using supported decision-making with their teams. Join these presenters to learn how you can implement this program in your state!

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

3:00 pm – 4:15 pm **Concurrent Breakout Sessions**

Not All Limited Guardianships Are Easy: Lessons Learned

Alice Paxton, NCG, CSA | Paladin Life Care

An offer to take on a case as successor limited guardian, only handling visitation, sounded easy: a little more money for very little effort! The reality was a different story. I was verbally attacked daily by both sides, taken to court for "abuse of authority," and a local news team became involved, broadcasting a story with the potential to jeopardize my business. My experience is not as unusual as you may think. Join this session for an interactive discussion of the lessons learned during this experience.

Financial Reporting: Data vs. Information

Teri McRae, NCG, MBA | McRae & Associates

Financial reporting often consists of summary totals and lists of transactions (data). You will learn how to turn that data into information that you, your clients, and reviewers can use. This higher level of professionalism and information will allow you to do a more thorough job for your clients and better protect yourself from challenges and lawsuits.

Programmatic Effects of Individuals Under Guardianship with a History of Violent or Dangerous Behavior

Pamela B. Teaster, Ph.D.
Virginia Tech Center for Gerontology
Michael Handy, AS, BSc
Kentucky Cabinet for Health and Family Services
Jessica Wayne
KY Cabinet for Health and Family Services, Department for Aging and Independent Living, State Guardianship

This study examined individuals under public guardianship in Kentucky with a history of violent or dangerous behavior. FY 2016 administrative data were analyzed, and 65 staff members were surveyed to elucidate impacts of this population on state public guardians.

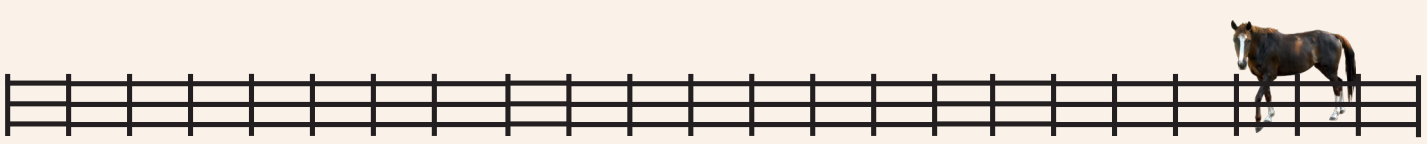
Addressing Problematic Behavior with Clients in Care Facilities

Joyce Meckna, CCM, CM | Advocate Care Services

Behavior can change for a variety of reasons, and "barring the door" is a real problem for residents with behavior issues in care facilities. Early identification and intervention are key components to a healthy and productive home environment for a person under guardianship. When they are in a community residential setting, behavior problems can present a dilemma for all involved. In this session, we will address working with facilities to intervene and preserve the living situation.

An encore presentation of the 10:30 session.

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



National Conference on Guardianship

4:30 pm – 5:30 pm **Concurrent Breakout Sessions**

Navigating Nursing Home Placement and Ensuring Quality Care
Denise Wells
Nursing Home Ombudsman Agency of the Bluegrass, Inc.

Navigating the long-term care system is confusing and frustrating. Participants will learn how to choose a facility and secure admission. Participants with clients or loved ones already living in long-term care will learn how to ensure quality care.

Behaviors Related to Brain Injury
Debbie Coleman
The Florida Institute for Neurologic Rehabilitation

This session is fun and interactive way to learn about brain injuries. How do I know its's a brain injury and not something else? How do I get help? How do I care for a client? Where do I refer a person with a brain injury?

Mediation in Guardianship
Lennie Burke, NCG | Harmony Mediation

Mediation may be relevant to avoiding guardianship, crafting the nature of the guardianship, or dealing with conflicts that arise. Guardians and others in our field will benefit from a basic understanding of mediation and the unique considerations of multi-party conflict, allegations of abuse or exploitation, and questioned competence.

Guardianship Assistance Program
Lisa Wawrzonek, MS
Alaska State Association for Guardianship & Advocacy

In July 2016, the Alaska State Association for Guardianship & Advocacy (ASAGA) started a guardianship assistance program for families and others navigating the adult guardianship system. In one year, there was a 625% increase in contacts, proving that Alaska needed a guardianship assistance program. Learn how the program works, and what tools might help you recreate in your state.

6:00 pm – 7:30 pm **Reception with Exhibitors and Live Auction**
Spend a fun evening with your fellow participants, visit with exhibitors who are available to answer your questions about their products and services, and enjoy some great food! A highlight of this event is the live auction of donated items; the proceeds benefit scholarships for public and family guardians.

Monday, October 14

7:00 am – 5:00 pm **Registration Area Open**

7:15 am – 8:10 am **Breakfast**

8:10 am – 8:15 am **Daily Opening Remarks**
Jeff Ohlson, Conference Chair

8:15 am – 9:45 am **What Does My/Your/Their Brain Say? Memory and Judgement Issues in Elder Abuse and Scamming**
Gregory A. Jicha, MD, PhD
University of Kentucky Alzheimer's Disease Center and the Sanders-Brown Center on Aging

Dr. Jicha presents an overview of how the brain functions from a neurologist's point of view, with live audience participation, that demonstrates how even a person with normal capacity and brain function can be fooled by his or her own senses. Taking this further, he describes in lay concepts how specific degenerative diseases such as Alzheimer's, vascular dementia, Lewy body disease, and frontotemporal dementia can exacerbate our intrinsic vulnerability to become victims of abuse and scams. He will close the session with a series of real-world cases that demonstrate that everything we thought was as clear as the difference between up and down, really lies somewhere in the middle. The presentation is designed to take you into the mind of those we have the responsibility to protect, and increase our understanding of their specific vulnerability to scamming, neglect, and abuse. Discovering new insights that can help us better protect those we serve is the goal of this presentation.

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

National Conference on Guardianship

10:00 am – 11:15 am **Concurrent Breakout Sessions**

Monitoring Guardianships

Sharon R. Bock, Esq., Clerk and Comptroller, Palm Beach County
Anthony Palmieri, JD, CIG, CIA | Clerk and Comptroller, Palm Beach County

Due to intense scrutiny, legislatures, agencies, and courts are making dramatic decisions about guardianship without reliable or empirical data. Learn how Palm Beach County Clerk's monitoring program and ground-breaking data collection and analysis system is changing the Florida guardianship landscape.

This session will be repeated at 2:00 pm.

How to Build a Guardianship Practice: The Early Years

Erin Droll, BA, NCG
Corridor Care Management

In 2013, a nervous and hesitant woman decided to start her own business providing guardianship services in Iowa. This was a relatively new concept for her area, and the state as a whole. This is the story of how someone who considers herself unambitious built one of the biggest practices in the state of Iowa. Erin will share where she started, where she's been, and what she's learned along the way. This is a great lecture for someone just starting their own practice, or wanting to. Experienced guardians who attend can share their own advice, and we can perhaps all take away some new ideas.

Leveraging Technology and Community Partners to Promote Guardianship Best Practices in Rural and Frontier Areas

Claire McDonnell
True Link Financial
Emily Smith, CSW, NCG
Wyoming Guardianship Corporation

These presenters will share details about a one-year partnership culminating in the development of a webinar to make training, rooted in the NGA's Standards of Practice, accessible to family or volunteer guardians challenged by frontier and rural areas. Specifically, participants will learn 1) how they can empower guardians in rural and frontier areas to teach best practices in the field to family or volunteer guardians, 2) low-cost tools to reach more guardians in rural and frontier areas who wouldn't otherwise be able to receive training, and 3) how to create or identify partnerships with other organizations to better serve clients for greater impact.

11:15 am – 12:00 pm **Networking Lunch**

12:00 pm – 12:30 pm **Dessert with Exhibitors**

12:30 pm – 1:45 pm **Concurrent Breakout Sessions**

Decisions, Decisions: Making Medical Decisions in Complicated Situations

Jan Welsh
Special Care for Older Adults, LLC
Deborah Liss Fins, LICSW, CMC
JHC LifeCare Management

The complexity of medical decision-making, which can include conflicts in DNR orders, end of life care, amputation, and cancer, psychiatric and dementia treatment(s), can stymie even the most experienced guardian. Through case discussion, explore the use of a collaborative care team and a model for assessment and decision-making.

Liability of Fiduciaries: That Bond Doesn't Protect Me?

Judge Brooke Allen | Probate Court No. 2 of Tarrant County, Texas

Every day, someone is appointed a fiduciary, as an estate administrator or guardian. The majority of these fiduciaries are bonded, not insured. In Texas, even some of our judges (such as our probate judges) are required to post a bond. However, when most sign the bonds, they either do not read the fine print, do not understand the fine print, or really do not think about the ramifications of the fine print. In this session, Judge Allen will survey whether the fiduciaries are required to have a bond or insurance, discuss the differences, and discuss the potential liability of fiduciaries acting as guardians. Judge Allen will also explain her opinion on how judges who are bonded should be viewing their case load, so as a practitioner it may assist you in understanding some of the reasoning behind decisions. Judge Allen will also discuss pertinent Federal and Texas cases relating to fiduciary liability of administrators, guardians, and judges.

Marrying High-Tech and High-Touch When Caring for Someone with Alzheimer's or Dementia

Scott Greenberg, CAEd
ComForcare Senior Services

The presentation will discuss where high-tech and high-touch come together to allow people to live their best lives possible. Scott will talk about different forms of technology that can help deliver quality care. He will help the audience understand the cost of technology, both on quality of care and the financial implications.

1:45 pm – 2:00 pm **Break with Exhibitors**

National Conference on Guardianship

2:00 pm – 3:15 pm **Concurrent Breakout Sessions**

Fine-Tuning Your Guardianship Practice

Erin Droll, BA, NCG
Corridor Care Management
Irene Rausch, NMG
Professional Guardian
Eric Mayfield, MA, NCG, CLPF
Konsulati, Inc.

Starting the business is the easy part, but expanding it, improving it, and winding down can be much more challenging. Our presenters, all business owners at various stages of their careers, will discuss the challenges faced as businesses evolve. Topics will include the fine-tuning of business models, technology investments, succession plans, and retiring or selling the business.

Value of Certification

Sally Balch Hurme, JD
Sally Balch Hurme LLC
Pamela B. Teaster, Ph.D.
Virginia Tech Center for Gerontology

As more guardians consider becoming a National Certified Guardian, and as more states consider making certification mandatory, the Center for Guardianship Certification asked how can we show what difference certification makes. Researchers Professor Pam Teaster and Sally Hurme set about finding an answer by asking certified guardians, and the judges who appoint them, their opinions about what certification – either voluntary or mandatory – means to their practices and courts. Teaster and Hurme will report on what they have learned.

Monitoring Guardianships

Sharon R. Bock, Esq.
Clerk and Comptroller, Palm Beach County
Anthony Palmieri, JD, CIG, CIA
Clerk and Comptroller, Palm Beach County

Due to intense scrutiny, legislatures, agencies, and courts are making dramatic decisions about guardianship without reliable or empirical data. Learn how Palm Beach County Clerk's monitoring program and ground-breaking data collection and analysis system is changing the Florida guardianship landscape.

An encore presentation of the 10:00 session.

3:15 pm – 3:30 pm **Break**

3:30 pm – 5:00 pm **Virtual Reality: Helping Guardians See Life and Death Through a Hospice Patient's Eyes**

Daryl J. Cady | Hospice of Southern Maine

This VR experience is not a game. It embodies Clay, a 66-year old veteran with terminal lung cancer, who is admitted to hospice and dies. Hospice of Southern Maine CEO Daryl Cady will discuss the program's development, and implications for end of life education.

5:00 pm – 12:00 am **Open Evening and Dine-Around in Lexington**

Lexington has an outstanding restaurant scene, and this is your chance to experience it! We will make reservations for small groups at various local restaurants. Once you arrive at the conference, visit the local area information table to view menus and sign up for one of the restaurants. This is a great opportunity to explore downtown Lexington and the surrounding areas, continue networking, visit with old friends, and make new connections. Shuttle transportation is provided.

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 jewelry to electronics and 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. View our **donation form** to learn more.

National Conference on Guardianship

Tuesday, October 15

7:00 am – 11:30 am — **Registration Area Open**

7:15 am – 8:10 am — **Breakfast**

8:10 am – 8:15 am — **Daily Opening Remarks**
Jeff Ohlson, Conference Chair

8:15 am – 9:45 am — **The Local and National Implementation and Evaluation of Eldercaring Coordination**
The Hon. Dixie Park | Probate Division, Stark County Court of Common Pleas
Pamela B. Teaster, Ph.D. | Virginia Tech Center for Gerontology
Douglas N. Godshall, Esq. | Stark County Ohio Probate Court
Megan L. Dolbin-MacNab, Ph.D., LMFT | Virginia Tech
Linda Fieldstone, M.Ed. | ElderJustice Initiative on Eldercaring Coordination
Sue Bronson | New Prospects

This panel presentation provides information on the implementation of Eldercaring Coordination, a less restrictive alternative to guardianship, in Stark County Ohio and nationally. Lessons from an evaluation of model are also presented.

9:45 am – 10:00 am — **Break**

10:00 am – 11:30 am — **Special Needs Trust Planning for the Guardian**
Robert L. McClelland, LLM, CELA | Elder Law Lexington

Special Needs Trust planning can be confusing for a guardian and, if improperly done, dangerous for the beneficiary's SSI and Medicaid eligibility. This presentation will outline "first party" trust planning, "third party" trust planning, and "pooled fund" participation. Helpful examples will be provided of how to approach a court for permission to do special needs planning, what is important about trustee selection and the trustee's role, how an advisory committee can help, and what happens when the trust terminates at the beneficiary's death or recovery of their rights.

Scholarships Are Available!

Each year, NGA offers three scholarships for the National Conference on Guardianship, which are supported by the silent and live auctions held each year at the conference. Each scholarship provides one complimentary registration to the conference, and limited travel and lodging expenses. **The application deadline for all scholarships is Friday, June 28.**

NGA Family Guardian Scholarship
This scholarship has been created to reward a family guardian who is a member of NGA or who holds membership in one of NGA's affiliate state organizations.

Fred Kretz Memorial Scholarship for Public Guardians
This scholarship rewards a public guardian who is a member of NGA, or who holds membership in one of NGA's state affiliate associations, and who has earned certification from the Center for Guardianship Certification.

NGA Board Legacy Scholarship
The Board Legacy Scholarship honors past directors of NGA's board and committee volunteers who have worked to establish and execute the mission of the organization.

View complete details and apply online here.

National Conference on Guardianship

Hotel Accommodations

Griffin Gate Marriott Resort and Spa
1800 Newtown Pike | Lexington, Kentucky
Phone: 859-231-5100
Book Online

Discover serenity and comfort at Lexington's Griffin Gate Marriott Resort & Spa. Nestled in the Bluegrass Country hills, this hotel is close to downtown and the Bourbon Trail. Relax during your stay with body treatments at the full-service luxury spa. Perfect your skills on the 18-hole championship golf course. Maintain your fitness routine in the 24-hour fitness center. Retire to your luxurious guest room or suite, featuring plush Tempur-Pedic beds and marble bathrooms. Treat yourself to delicious cuisine at the restaurants, including JW's Steakhouse.

For reservations, visit the reservation website
or
call the hotel's reservations line at 800-228-9290 or 857-231-5100.
You must identify yourself as part of the National Guardianship Association's 2019 conference 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: $189.00, plus taxes.

NGA cannot guarantee room availability. The discounted group rate concludes at 5:00 pm Eastern on **Wednesday, September 25**. 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 well before the deadline***. At that point, you are competing with other guests for rooms. Requests for reservations after September 14 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.

Shuttle transportation is provided from the Blue Grass Airport in Lexington (LEX). Complimentary airport shuttle service will be available during peak arrival/departure times. Once you have booked your flights, enter your flight details to help plan the transportation.

Alternate airports include the Louisville International Airport (SDF), 74 miles, and the Cincinnati/Northern Kentucky International Airport (CVG), 76 miles.

Continuing Education

This main conference program holds a potential of 16.0 credit hours, and a full day of intensives adds another 6.0. 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. Duplicate sessions may not be counted twice. 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 Kentucky. Certificate fees apply to receive a legal certificate. Individuals outside of Kentucky 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.

Arrive Early, Leave Late, and Explore Lexington!

Welcome to Bluegrass Country, the "Horse Capital of the World." But you don't have to be an avid racehorse fan to enjoy the natural beauty, culture, and history that this exciting city has to offer. At the Raven Run Nature Sanctuary, for example, hiking trails wend their way through forests, meadows and gentle creeks, taking you past historic landmarks; there's even a nighttime guided walk for stargazing. Horse lovers know that, with more than 500 horse farms, Lexington is the best place in the world for raising thoroughbred horses. The Kentucky Horse Park features films, horse shows, and exhibits. Historic sites are plentiful here, including the Waveland State Historic Site, the childhood home of Mary Todd Lincoln, and the Ashland estate of famed Kentucky statesman Henry Clay. Check out some of these attractions when you visit.

Kentucky Horse Park

Dedicated to man's relationship with the horse, the Kentucky Horse Park is unlike any other park in the world. It is a showcase of museums, galleries, theaters, and working farm exhibits. Nearly 50 breeds of horses graze upon its 1,200 acres of lush pastures.

Keeneland Race Course

With its tranquil setting and lovely stone fences and buildings, this national historic landmark is one of the most genteel and beautiful racetracks in the world. Try your luck at the October race meet, or tour the grounds. Get up early to see horses working out on the track, then head over the the Track Kitchen for a hearty Southern breakfast. Check the website for post times.

Shaker Village of Pleasant Hill

Visit the largest restored Shaker community, with 3,000 acres of farmland and 34 restored 19th-century buildings. Shaker Village hosts a wide variety of hands-on classes, music performances and special events and has 33 miles of trails for hiking and horseback riding (bring your own horse). Dining is available. Kentucky River excursions aboard the paddle wheeler Dixie Belle are given from April through October.

Tour Horse Farms

Beautiful horse farms have been part of the Bluegrass since the region was first settled, and so have horse farm visitors. When great 20th-century Thoroughbred Man o' War retired to the Bluegrass, visitors from around the world flocked to see him. When Man o' War died in 1947, there were 63 visitor ledgers, containing over 1.3 million names. Ready to do your part to uphold this great Bluegrass tradition? Visiting a horse farm while you're in town is a uniquely Bluegrass kind of experience you'll long remember. And it's easier than you might think. There are more than 500 horse farms in the region, and they're all working farms – which means you should never just "drop by" – but more than a few allow visitors by appointment or through arrangements with professional tour companies.

Hit the Bourbon Trail

Tour a Bluegrass bourbon distillery and you'll not only learn how bourbon is made, but you'll start to understand why the spirit has inspired pride, passion (and even poetry) among Kentuckians. Bourbon is America's only native spirit. And almost all bourbon – 95% according to the Kentucky Distillers Association – is produced in Kentucky. Kentucky Bourbon is the largest export category of all U.S. spirits, shipping more than 28 million proof gallons to 126 countries in 2010. Celebrate the living history of Kentucky Bourbon at nearby distilleries such as: The Woodford Reserve Distillery, Buffalo Trace, Four Rose, Wild Turkey, James E. Pepper and Town Branch. These aren't just "visitor experiences!" These are real working distilleries. You can plan to visit individual distilleries, or arrange a tour through various operators.

Conference Fees

NGA Member Rates

Early Bird Discounted Registration if Received BEFORE August 24

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 August 24 and September 20

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 20

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

NGA Non-Member Rates

Early Bird Discounted Registration if Received BEFORE August 24

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 August 24 and September 20

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 20

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

Not a Member?

Join Now and Pay Member Rates!

Individual Membership	$180
Org. Membership** first employee	$260
Org. Membership* add'l employee	$110
Family, Volunteer, Retired	$60

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

Family Guardian Fee
(applies to members and non-members)

Sunday or Monday*	$50
Full Conference	$425

*Family guardian single day rate includes sessions, exhibits, and food functions until 5:00 pm. Family single day rate is for one day only. Anyone wishing to attend additional days will pay the regular single day rate.

Information About Conference Fees

Registration for the Saturday Conference Intensives: Full-day or half-day sessions require additional fees. Payment covers one of these sessions. Registrants may only attend/receive the materials for the session(s) 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.

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.

Guests can be accommodated for some meals. Please email registration@guardianship.org for pricing and availability.

www.guardianship.org | 877-326-5992 | registration@guardianship.org

NGA Registration Form
2019 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 before August 24 for the early bird discount.
Late registration fees apply after September 20.

2019 Conference Registration

Registration fees are available on the previous page.

_____
Complete name, include any designations (please print clearly)

_____
Name as you want it to appear on your name badge, include any designations

_____
Agency/Organization/Company

_____
Mailing address

_____
City, State, Zip

_____
Phone Cell phone if we need to reach you at the conference

_____
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.
- ❒ Vegetarian
- ❒ Vegan
- ❒ Other: _____
- ❒ Gluten Free
- ❒ Dairy-Free
- ❒ Please contact me to discuss.

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

Registration Payment (Federal ID # 36-3591860)

❒ Please email me a receipt for my records.

Register and 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 ❒ American Express

_____
Name on Card (print)

_____
Account Number

_____
Expiration Date Security Code

_____
Signature

Early bird registration if received BEFORE August 24

	NGA Member	Non-Member
Full Conference	$_____	$_____
Sunday only	$_____	$_____
Monday only	$_____	$_____
Tuesday only	$_____	$_____
Intensive: Legal & Legislative Review	$_____	$_____
Intensive: Lawyers, Guns, and Money	$_____	$_____
Intensive: Boots on the Ground	$_____	$_____

Advance registration BETWEEN August 24 and September 20

	NGA Member	Non-Member
Full Conference	$_____	$_____
Sunday only	$_____	$_____
Monday only	$_____	$_____
Tuesday only	$_____	$_____
Intensive: Legal & Legislative Review	$_____	$_____
Intensive: Lawyers, Guns, and Money	$_____	$_____
Intensive: Boots on the Ground	$_____	$_____

Regular registration if received AFTER September 20

	NGA Member	Non-Member
Full Conference	$_____	$_____
Sunday only	$_____	$_____
Monday only	$_____	$_____
Tuesday only	$_____	$_____
Intensive: Legal & Legislative Review	$_____	$_____
Intensive: Lawyers, Guns, and Money	$_____	$_____
Intensive: Boots on the Ground	$_____	$_____

Additional Registration Options

Family Guardian Single Day: _____ $_____
Please indicate which day.
Certificate (order certificate on next page) $_____
Not a member? Save by joining NGA today $_____

Total for Conference Registration: **$_____**

No refunds will be issued after Monday, September 30. Cancellations after September 30 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 12 – 15 | Lexington, KY

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 Kentucky (or any other state that accepts Kentucky'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 _____ American Express

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.