NGA
NATIONAL GUARDIANSHIP ASSOCIATION

NATIONAL CONFERENCE ON GUARDIANSHIP

October 22 - 25, 2022

Westin Galleria Dallas
DALLAS, TX

Deep in the Heart of Guardianship

Welcome to the National Guardianship Association's 2022 National Conference on Guardianship. As you've come to expect from NGA, this year's program features outstanding presentations that will appeal to professional and family guardians, public and private guardians, and participants at every level of experience. New this year is a separate program that has been developed for guardianship investigators, auditors, and other professionals who monitor and investigate guardianship.

This conference is being offered in-person. NGA will adhere to any federal, state, or local guidelines related to the status of the pandemic at the time of the event.

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

SATURDAY CONFERENCE INTENSIVES

National Conference on Guardianship | October 22 – 25, 2022

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 — **Starting, Growing, and Maintaining a Guardianship Business**

Erin Droll, BA, NCG | Corridor Care Management
April Vlaanderen, MA, NCG | Corridor Care Management

The presenters will discuss how they have responded to challenges as their practice has grown from incorporation as a small business partnership to a mid-size LLC with public and private contracts. Topics will include incorporation, case vetting, case transition, contract considerations, and discussion of day-to-day processes. The presenters will share how they stay HIPPA compliant, as well as offer information about how they use technology to increase efficiency and stay compliant. Finally, they will discuss building a network of professional colleagues and referral sources and explain which tasks they have decided to handle in-house vs. tasks that can be outsourced.

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
Gregory W. MacKenzie, JD | Hurley Toevs Styles Hamblin & Panter, PA
Elizabeth A. Moran, JD | ABA Commission on Law and Aging
Ira Salzman, JD | Retired

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 — **Diverting the Healthcare-to-Guardianship Pipeline: A Person-Centered Approach**

Nisa C. Subasinghe, Esq. | Maryland Judiciary – Admin. Office of the Courts
Judge DaNeeka Varner Cotton | Circuit Court for Prince George's County, MD
Diane Robinson, PhD |National Center for State Courts
Megan A. Rusciano, Esq. | Disability Rights Maryland
Erica C. R. Costello, JD, NCG | ABA Commission on Law and Aging

Healthcare facilities routinely file guardianships to discharge patients with diminished capacity or qualify them for medical assistance. This session will examine this pipeline's scale, its decision-makers, and different approaches for diverting people away from guardianship and to less restrictive options.

CONFERENCE SCHEDULE

National Conference on Guardianship | October 22 – 25, 2022

SATURDAY, OCTOBER 22

4:00 pm – 5:30 pm	**State Affiliates Meeting**
5:30 pm – 6:30 pm	**Welcome Reception** Greet old friends and make new connections as participants gather to kick off this year's event!

SUNDAY, OCTOBER 23

7:00 am – 5:30 pm	**Registration Area Open**
7:00 am – 7:45 am	**Breakfast**
7:00 am – 7:45 am	**New Member Breakfast**
8:05 am – 8:15 am	**Welcome and Opening Remarks** **Carleton Coleman, 2022 Conference Chair**
8:15 am – 9:45 am	**Judges' Panel** **Judge DaNeeka Varner Cotton | Circuit Court for Prince George's County, MD** **Judge Milton Mack (ret.) | Michigan State Court Administrative Office** **Judge Brenda Hull Thompson | The Probate Court of Dallas, Texas** **Judge Egan Walker | Second Judicial District Court, State of Nevada** **Moderated by Terry Hammond | Texas Guardianship Association** In this session, a panel of probate judges from Texas, Maryland, Michigan, and Nevada 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 questions from our moderator to extract insight into the workings of a probate court.
9:45 am – 10:15 am	**Break with Exhibitors**

#guardianship2022

Promote your conference participation with our social media hashtag!

NATIONAL CONFERENCE ON GUARDIANSHIP

10:15 am – 11:30 am **Concurrent Breakout Sessions**

From Protection to Autonomy: Changing the Trajectory of Adult Guardianship

Teresa Parks, MSW, NCG
Illinois Guardianship and Advocacy Commission
Dr. Mary L. Milano
Illinois Guardianship and Advocacy Commission

This presentation examines the intentional cultural shift within a governmental agency, leading to a multi-year pathway of change related to recognizing the autonomy of persons for whom the state has historically served in a more paternalistic fashion through guardianship. The presentation examines both internal and external pursuits to recognize and facilitate the autonomy of persons with disabilities, including those under guardianship. Finally, the presentation will share potential pathways toward continued change and development and how the values represented can survive political change.

Abuse, Neglect and Exploitation: Identification, Prevention, and Getting Help for Your Client

Joyce McHugh, CM, CCM, BSW, MSW
Advocate Care Services

Abuse, neglect, and exploitation are significant issues for at-risk persons. Identifying the signs can be challenging - are bruises always abuse? If your client gives their caregiver extra money, is that exploitation? What constitutes neglect and what about self-neglect? Are these issues preventable? Do any of them present an ethical dilemma for the social worker or guardian? If a family member is abusing them, does that mean they can never see them again? This session will take an in-depth look at these issues and outline prevention strategies. Using a case study, interactive discussion, and handouts, we will cover identification of abuse, neglect, and exploitation, how to get help for a client, advocacy through a legal process, and prevention. Expect a lively and comprehensive session!

Updates to Standards of Practice

Julia R. Nack, M.Ed., NMG Emeritus Consultant
Gregory W. MacKenzie, JD
Hurley Toevs Styles Hamblin & Panter, PA
Anthony Palmieri
President, National Guardianship Assn.
Paul Stengle
The Arc Alliance
Sally Balch Hurme, JD
Sally Balch Hurme LLC

This is your chance to discuss the proposed changes to the NGA *Standards of Practice*. In light of the recommendations of the 4th National Guardianship Summit, and the advances in practices reflected in the new Uniform Guardianship, Conservatorship, and Other Protective Arrangements Act (UGCOPAA), the NGA board recognized some updating of the Standards was due. A task force has been meeting for the past year to take a thorough look at the *Standards of Practice*, which were last revised in 2013. Members of the task force will lead a discussion about the board-recommended changes. The membership will vote on whether to accept the new Standards at Monday's business meeting.

11:30 am – 12:15 pm **Networking Lunch**

12:15 pm – 12:45 pm **Dessert with Exhibitors**

12:45 pm – 2:00 pm **Concurrent Breakout Sessions**

Innovation Within the VA: A Program Dedicated to Legal Guardianship

Lara VandenBergh, LCSW
Department of Veteran's Affairs

Learn about the innovative steps the Eastern Colorado VA has taken to address the aging Veteran population when it comes to decision-making and guardianship acquisition. Hear about the challenges, successes, and future goals of this program. After attending this presentation, participants will be able to bring ideas and creative solutions back to their agencies or communities to implement when faced with similar challenges related to legal guardianship.

Disarming Anger

Ronna Caras
Center for Guardianship Excellence

Anger, in all its forms, presents emotional and tactical challenges to guardians. For many, the stakes are high and patience is short. This workshop teaches professional strategies for engaging with clients, providers, and families before anger explodes. It presents best practices for calming and disarming so that rational solutions can be discussed.

Ethical Implications of Guardian Self-Dealing

Judge Egan Walker
Second Judicial District Court, State of Nevada
Tracey Bowles, M.A., MFT, NCG, CPM
Washoe County Public Guardian

This presentation will explore the ethical pitfalls of guardian self-dealing through case studies and utilization of practical tools for the guardian. The judicial perspective includes how statutes and regulations may help protect the person under guardianship, and suggest ways participants can advocate for court involvement and oversight.

2:00 pm – 2:30 pm **Break with Exhibitors**

SAFETY IS STILL A PRIORITY

NGA and Westin Galleria Dallas take the safety of our attendees, NGA volunteers and staff, and hotel staff seriously. Last year, we increased the length of breaks between breakout sessions to 30 minutes to allow for additional cleaning and less congestion during breaks, and we have maintained that timing. While details may change as the pandemic continues to evolve, we will continue to carefully follow all federal, state, and local direction regarding safely holding a meeting.

2:30 pm – 3:45 pm **Concurrent Breakout Sessions**

Elder Justice Innovation Across the Nation

Elizabeth A. Moran, JD
ABA Commission on Law and Aging
Lisa Wawrzonek, MS
Alaska Court System
Nisa C. Subasinghe, Esq.
Maryland Judiciary – Administrative Office of the Courts
Evelyn J. Patsos, Esq.
Massachusetts Probate & Family Court
Jamie Majerus, CPA, CIA, CFE
Minnesota Judicial Branch
Kathleen McCloskey MA, LPM
Nevada Supreme Court
Jeffrey Petty
Oregon Judicial Department
Deena Schwartz, Esq.
Project Guardianship

In late 2021, ACL awarded the highest courts of seven states with two-year Elder Justice Innovation Grants. Grantee panelists will discuss the fairness, effectiveness, timeliness, safety, integrity, and accessibility of adult guardianship/conservatorship proceedings, and development of innovations for improvement.

Protecting the SNT Trustee From Litigation

Jeremy Lau, CFA®, CFP®
Prudent Investors

The SNT Trustee has a fiduciary obligation towards the SNT beneficiary, which represents the highest duty one can owe another under the law. The presenter will discuss the various ways in which an SNT Trustee should protect themselves from potential liability e.g, written procedures or sufficient insurance. He will also discuss common SNT Trustee duties that trigger potential liability such as poor investments, bad recordkeeping, loss of public benefits, and fights over distributions, among other similar issues. Finally, he will discuss what the SNT Trustee can expect if litigation is unavoidable.

Starting a Non-Profit Community Guardianship Program: A Case Study

Kent Davis, MPH, NCG
Volunteer Guardianship One on One
Robert Shanahan, Esq.
Volunteer Guardianship One on One

Volunteer Guardianship One on One pioneered community guardianship in New Jersey. The presenters will describe the concept of community guardianship, how the agency works with public agencies, and share outcomes for stakeholders interested in creating a similar program in their communities.

3:45 pm – 4:15 pm **Break with Exhibitors**

4:15 pm – 5:30 pm **Concurrent Breakout Sessions**

Working with High Conflict Families: Multidisciplinary Exploration of Effective Management Techniques

Judge Egan Walker
Second Judicial District Court, State of Nevada
Tracey Bowles, M.A., MFT, NCG, CPM
Washoe County Public Guardian

This presentation will explore high-conflict family dynamics and their impact on guardianship. Following a case study, the presenters will explore successful opportunities for intervention at the attorney client level, from the bench, and from the guardian's perspective.

A New Mexico Statewide Training Program in Ethics and Skill Development for Guardians: A Multidisciplinary Model

Susan Bennett
CNM Ethics in Guardianship Program
Susan Stuart, BUS, CMC, NMG
Decisions in Care, LLC

Seven professionals saw the need for in-depth ethics training and skill development for new and practicing guardians in New Mexico. Their cooperative efforts produced a training program including ethics, law, cultural diversity, intellectual disabilities, medical and behavioral health, advance directives, decisional capacity, biomedical ethics, sexuality and spirituality, fiduciary responsibilities, and tools for challenging situations. The presenters will share the program development and implementation, discuss how it has been received, and suggest ways to adapt this process for your state or local program.

Establishing a Decision Framework for Making Difficult Decisions

Daniel Cutter, CRPC®
Merrill – The Special Needs Team
Dion Hobbs
Merrill – The Special Needs Team
Douglas Quint, CEPA®, CPFA®
Merrill – The Special Needs Team

Establishing a decision framework will help you choose the best outcome to help your client live his/her best life while protecting your practice in the process. The panelists will illustrate how to use financial planning to make difficult decisions for your clients. In a litigious society, it is imperative to follow a consistent, repeatable process for making decisions for your clients. The presenters will show you how long the money lasts and how following this process protects you from liability.

5:30 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.

NATIONAL CONFERENCE ON GUARDIANSHIP

MONDAY, OCTOBER 24

7:45 am – 5:00 pm **Registration Area Open**

8:00 am – 9:00 am **Breakfast**

8:40 am – 8:50 am **Daily Opening Remarks**
Carleton Coleman, Conference Chair

9:15 am – 10:30 am **Concurrent Breakout Sessions**

Show Me the Money! Creative Opportunities and Strategies for Funding Guardianship Programs and Clients

Erica C. R. Costello, JD, NCG
ABA Commission on Law and Aging
Rebecca M. Pryor, MSM, NCG
Creative Approaches, LTD/WINGS IN Adult Guardianship State Task Force
Missy Tackett, NCG
Southern Indiana Adult Guardianship Services/The Solutions Center

This interactive session will provide information and strategies for family, public, and professional guardians about ways to creatively increase their in-kind and cash budgets. Employing NGA Standards, attendees will learn how to incorporate diversity, equity, and inclusion into funding strategies.

Knowing Your Place: How to Talk About Social Identity

Joanne Tompkins, PhD
The Center for Guardianship Excellence

Characteristics like gender, race, age, and abilities influence interactions, opportunities, and outcomes for individuals under guardianship. Is someone included or excluded? Advantaged or disadvantaged? This session discusses how intersecting social identities shape perceptions, experiences, and relationships, particularly guardianship relationships, and provides strategies for discussing sensitive topics.

Blended and Complex Families, Joint and Separate Property, Divorce, and Guardianship

Bridget L. Mullins, Esq.
Pregenzer Baysinger Wideman & Sale, P.C.
Laurie Hedrich, Esq.
Hedrich Law, P.A.

The presenters will explore guardianship cases in the context of complex family dynamics including joint and separate property, divorce, blended families, and family conflict. The presenters will use case studies to examine the dos and don'ts of addressing these issues in court.

10:30 am – 11:00 am **Break with Exhibitors**

11:00 am – 12:15 am **Concurrent Breakout Sessions**

Discovering a Person's Goals, Needs and Preferences: Lessons from Peacemaking

Harvie Leonard (Lennie) Burke, NMG
Specialty Guardian Services

Guardians are directed to give first priority to a person's needs, goals and preferences in their decision making. They are directed to gather that information, but not told how to do that. The presenter will review strategies, tactics, and obstacles to communication based on his experience as a professional mediator and peacemaker.

Case Presentation: When a Client Kills Someone

Joyce McHugh, CM, CCM, BSW, MSW
Advocate Care Services

This is a case study presentation of a client who shot and killed someone, and the legal process and guardian's role from incident to resolution. The ethical challenges and considerations presented when protecting the rights of a client who has killed someone will be discussed.

Business Succession Planning that Meets the Ethical Continuity of Care Standard

Frank R. Acuña
Acuña ❖ Regli, LLP

Fiduciary ethics require that a fiduciary plan for their own incapacity, death, or retirement to provide for their clients' "continuity of care." However, the courts and the legislature have failed legal options or guidance for fiduciaries to create such plans or to use business organizations available to other professions. This course will examine current laws and typical succession plans, evaluating whether they comply with current law and fulfill the duty of continuous care. Several business structures which are available will be explained, as will language that should be considered in every trust, retainer letter, or court appointment of a licensed professional fiduciary. This is one of the most hotly debated topics in fiduciary practice. Be ready for a lively discussion!

NATIONAL CONFERENCE ON GUARDIANSHIP

12:15 pm – 1:45 pm **Lunch and Annual Meeting**

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

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

Supported Decision-Making in Guardianship: How Guardians Can Use Supported Decision-Making Principles to Benefit Individuals Under Guardianship

Kristen Henry
Advocacy & Protective Services, Inc.
Jill Couch
Advocacy & Protective Services, Inc.
Josh Young
Ohio Network for Innovation
Eric Bell
Advocacy & Protective Services, Inc.

Guardianship provides important legal authority but does not solve or prevent every problem. In this session, participants will learn when and how to use supported decision-making (SDM) principles and practices to help protect the person and promote greater independence.

How to Decide Whether to Invest a Client's Funds or Leave in Cash

Darryl J. Lynch, AIF®
The Lynch Group, Oppenheimer & Co. Inc.
Peter C. Palumbo, AIF ®
Oppenheimer & Co. Inc.

This presentation will provide tools that can be used in your everyday practice to make objective decisions and document your process. These tools will allow you to reduce your risk and liability as a fiduciary. By working through concrete examples, you will learn how to measure risk tolerance, decide whether to invest client funds, and determine appropriate asset allocations and investment strategy.

Why and How of Certification

Sally Balch Hurme, JD
Sally Balch Hurme LLC
Julia R. Nack, M.Ed., NMG Emeritus
Consultant

For 25 years the Center for Guardianship Certification has been certifying guardians who have demonstrated that they can apply the NGA Ethical Principals and Standards of Practice. If you are not already a National Certified Guardian, you should be. Find out why you should, what it takes to become an NCG, and how you go about it. If you are already an NCG, it's time you took the next step to be a National Master Guardian. Find out why you should, what it takes to become an NMG, and how you go about it.

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

3:45 pm – 5:00 pm **Concurrent Breakout Sessions**

Guardianship Court Improvement: Effectuating Improved Processes and Outcomes in U.S. Guardianship Systems

Elizabeth A. Moran, JD
ABA Commission on Law and Aging
Benjamin Orzeske, JD
Uniform Law Commission
DeAnza Valencia, MS, JD
AARP

Panelists from AARP, ABA, and ULC will discuss the GCIP, UGCOPPA, and recent guardianship reform efforts. These efforts are effectuating improved data collection, oversight and accountability, avoidance of unnecessary or overbroad guardianship, enhanced collaboration among courts, agencies, and organizations impacting adults subject to guardianship.

When All You Have Is a Hammer: The Misuse of Adult Guardianship to Fill Gaps in Other Systems

Jennifer Donovan, JD
Iowa Department on Aging – Office of Public Guardian

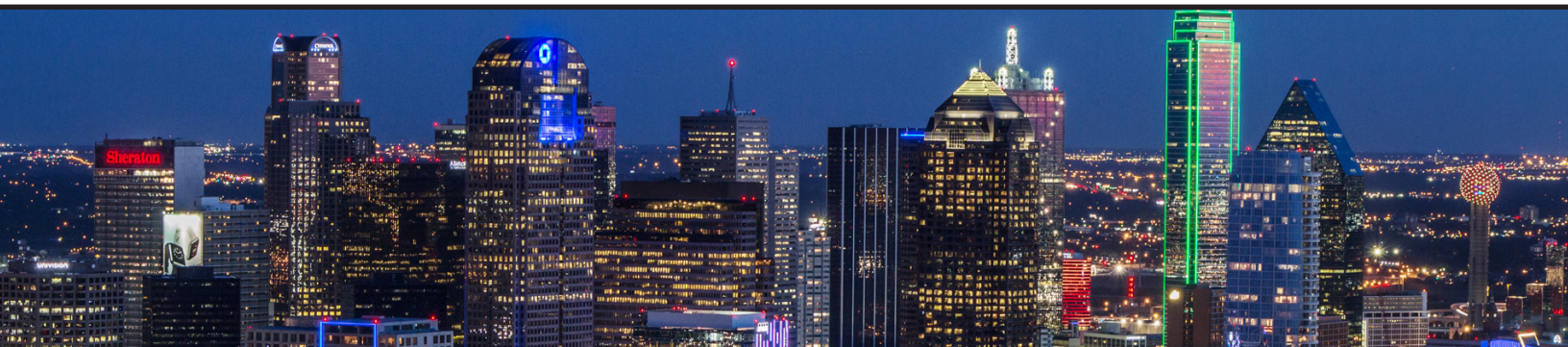
When all you have is a hammer, everything looks like a nail. As the toolbox of available decision-making supports expands, it is important to consider which tools are most appropriate for situations that have traditionally been addressed with the "hammer" of guardianship. This presentation will explore the use and misuse of guardianship – especially public guardianship – to address various situations.

Ethics Jeopardy!

Frank R. Acuña
Acuña ❖ Regli, LLP

Presenting ethics in a fast moving, informative format. Questions and answers are taken from various state and federal laws, codes of ethics, and reported cases throughout the United States of America. Cues and responses will be given, followed by a short explanation of the ethical issue raised and its resolution. The source of the resolution will be given to allow participants to study in greater detail.

5:00 pm **Open Evening to Enjoy Dallas**



NATIONAL CONFERENCE ON GUARDIANSHIP

TUESDAY, OCTOBER 25

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

7:00 am – 8:00 am — **Breakfast**

8:05 am – 8:15 am — **Daily Opening Remarks**
Carleton Coleman, Conference Chair

8:15 am – 9:45 am — **What Courts Are (or Are Not) Doing to Improve Data Collection**

Sally Balch Hurme, JD | Sally Balch Hurme LLC
Erica Wood, JD | Elder Law Advocate
Pamela B. Teaster, PhD, MA, MS | Center for Gerontology, Virginia Tech
E. Carlisle Shealy, PhD | Center for Gerontology, Virginia Tech
Diane Robinson, PhD | National Center for State Courts

For too long the lack of good data has hampered our understanding of how the guardianship system actually works. Anecdotal stories of abuse have harmed all those stakeholders--courts, guardians and policy makers--who strive to best serve the most vulnerable of our citizens. Researchers through a contract with the National Institute of Justice of the U.S. Department of Justice have delved into the thicket of discerning current adult guardianship data capabilities and what that data might reveal of any guardian abuses. They report on their findings and the opportunities they identified that will advance our understanding of data collection and guardianship oversight.

9:45 am – 10:00 am — **Break**

10:00 am – 11:30 am — **Serious Mental Illness: A Collaborative Approach**

Judge Milton Mack (ret.) | Michigan State Court Administrative Office
Janet M. Thompson | Boone County Missouri Commission
Karen Digh Allen, Esq., NCG | Callaway County, Missouri
Amanda Huffman | Morgan County Public Administrator

This presentation will focus on the use of a collaborative approach to address the lack of adequate resources and funding to meet the needs of persons with a serious mental illness. The panel will present a historical perspective on these issues along with relevant facts of the brokenness of the current system that fails to provide timely and appropriate services and support to persons with a serious mental illness. The panel will present information about the work of the National Judicial Task Force to Examine State Courts' Response to Mental Illness and about collaborative efforts nationwide to improve services, early intervention treatment, and available resources for individuals with serious mental illness.

11:30 am — **Final Remarks, Conference Concludes**

CONFERENCE SCHOLARSHIPS

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, July 8.**

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

SPECIAL TRAINING PROGRAM

FOR GUARDIANSHIP INVESTIGATORS:

PROTECTING PERSONS SERVED BY STATE GUARDIANSHIP/CONSERVATORSHIP SYSTEMS

NGA is proud to announce a pilot certificate program that will build upon your expertise with guardianship oversight and accountability standards. This is specialized training for guardianship and conservatorship investigators, auditors, monitors, and reviewers with any local, state or federal role.

This four-day event will be held concurrent with the National Conference on Guardianship in Dallas, TX on October 22-25, 2022.

Participants will:

- Learn the steps for investigating, documenting, and reporting guardianship complaints
- Identify common and uncommon red flags that warrant a deeper assessment
- Practice interview skills for uncovering the truth
- Review best practices for auditing and accounting
- Apply NGA Ethical Principles to case studies to determine appropriate resolutions
- Leave with more than 20 CEUs

Class size is limited, so participants should register early. The eligibility requirements to participate with this specialized training, including experience, education, and supervisory approval, are waived for the 2022 certificate program. The number of CEUs is tentative depending on a granting agency's final approval.

The event schedule will mirror the schedule outlined for the National Conference on Guardianship, and participants will have access to the same meals, breaks, activities, and receptions as conference attendees. This program schedule includes full days of programming on Saturday, Sunday, and Monday, and a half day or programming on Tuesday. Please see page 12 for registration fee details.

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 the donation form to learn more.

NATIONAL CONFERENCE ON GUARDIANSHIP

ACCOMMODATIONS

Westin Galleria Dallas
Hotel Website
13340 Dallas Parkway | Dallas, Texas
Book Online

Experience the best at The Westin Galleria Dallas. Find name-brand shopping at the Galleria Mall, located within convenient walking distance of the hotel. Both Dallas-Fort Worth International Airport and Dallas Love Field are short drives away. Stay on track in the 24-hour fitness center, featuring the latest cardio machines and free weights or take a dip in the outdoor pool. Luxury suites offer signature Westin Heavenly Beds®, engineered for the deepest, most restful sleep. Stay connected with social media, stream the latest movie using high-speed Wi-Fi or enjoy a wide selection of channels on your room's flat-screen TV. Invigorate your senses with our line of bath amenities, which give you the energy you need for your day in Dallas.

For reservations, visit the reservation website.
or
call the Marriott's reservations line at 888-236-2427.
You must identify yourself as part of NGA's 2022 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 (rate does not include taxes)
$199.00 per night

NGA cannot guarantee room availability. The discounted group rate concludes on **Wednesday, September 28**. 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 28 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.

Airport Information

The Westin is located 16.1 miles from Dallas Fort Worth International Airport (DFW) and 18.0 miles from Dallas Love Field (DAL). The hotel does not offer a shuttle service.

CONTINUING EDUCATION

NGA's conference is approved for guardianship continuing education credits by the Center for Guardianship Certification (CGC) and any state that accepts CGC's approval.

- The main program holds a potential of 14.50 credit hours.
- A full day of conference intensives adds another potential 6.0 hours.

Due to accrediting body approval processes, the specific number and type of credits accepted will not be defined 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 and presenters will announce three codes during each session: one at the beginning of the session, another in the middle, and another near the end of the session. Codes MUST be submitted online to receive proof of attendance; should you miss one of the codes, you may record the time you entered or exited the room. 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. 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 the proof of attendance codes online. This certificate can be submitted as proof of attendance to areas of education where NGA did not seek pre-approval.

State-Specific Guardianship Credits

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 Texas. Certificate fees apply to receive a legal certificate. Individuals outside of Texas seeking legal credits should contact their state boards prior to the conference to see if their state accepts Texas approval prior to purchase of the legal certificate.

Social Work Credits

NGA applies for social work credits with NASW. Verify that your state accepts the NASW approval. NGA is only able to offer CEUs through NASW for attendance at the live event. Certificate fees apply to receive a social work certificate.

Issuing of Certificates

To issue your certificate in a timely manner, NGA must receive your attendance code verification form promptly. Individuals submitting verification codes on or before November 4 will receive certificates by December 16. If proof of attendance code submissions are received after November 4, a late fee of $25 will be charged. Certificates can be downloaded online.

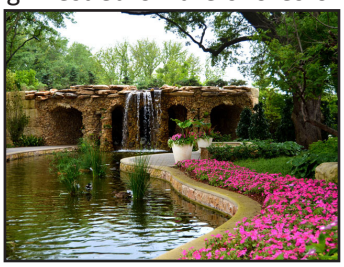
ARRIVE EARLY, LEAVE LATE, AND EXPLORE THE DALLAS AREA!

SIXTH FLOOR MUSEUM AT DEALEY PLAZA

One of Texas' most visited historic sites, The Sixth Floor Museum at Dealey Plaza chronicles the life, death and legacy of President John F. Kennedy. The museum is in the former Texas School Book Depository building, where evidence of a sniper was found after the assassination of President Kennedy on November 22, 1963. Much of the exhibit space looks as it appeared in the 1960s. Highlights include a sniper's perch, the FBI model used by the Warren Commission, an original teletype machine that first transmitted news of the president's death, Oswald's wedding ring, historic films, photos and more. An interactive display overlooks Dealey Plaza.

DALLAS ARBORETUM & BOTANICAL GARDENS

A nationally acclaimed 66 acre display garden features breathtaking floral displays all year long. Nestled on the shores of White Rock Lake, the Dallas Arboretum was named "One of the Most Breathtaking Gardens in the World" by Architectural Digest. Autumn at the Arboretum-September-November features a nationally acclaimed Pumpkin Village featuring over 90,000 pumpkins/gourds/squash and named one of America's Best Pumpkin festivals by Fodor's Travel.



STATE FAIR OF TEXAS

At 24 consecutive days, the State Fair of Texas is the longest-running fair in the nation, as well as one of the largest. Through its rich and lengthy history, it remains evident that the State Fair serves not only as an annual celebration but as a unique destination that brings people from all walks of life together to create lifelong memories. The State Fair runs through October 23, 2022.

REUNION TOWER

Reunion Tower, an iconic Dallas landmark, offers panoramic 360-degree views of the Dallas skyline. The Reunion Tower GeO-Deck offers an indoor/outdoor observation deck 470 feet in the air!

GEORGE W. BUSH PRESIDENTIAL CENTER

The George W. Bush Presidential Center is a state-of-the art facility on the campus of Southern Methodist University in Dallas, Texas. It is home to the George W. Bush Library and Museum and the George W. Bush Institute. The Library and Museum features both permanent and special exhibits, a precise replica of the Oval Office, beams from the World Trade Center twisted from the events of 9/11, a Texas Rose Garden, and a number of interactive exhibits. The popular Decision Points Theater enables visitors to experience the presidential decision-making process first-hand.

VISIT FORT WORTH

Once home to cowboys, cattlemen and outlaws, today Fort Worth's Stockyards National Historic District is one of the most popular attractions in Texas. Day and night, visitors come to the Stockyards to get a taste of the true American West. Begin your journey on Exchange Avenue, where the weathered brick streets are lined with historic buildings, restaurants, shops, saloons and other attractions. See The Fort Worth Herd, the world's only twice-daily cattle drive, at 11:30 a.m and 4 p.m. Billy Bob's Texas is the world's largest honky-tonk. The club has almost three acres under one roof with its own indoor rodeo arena for exciting live bull riding every Friday and Saturday, a Texas-sized dance floor, dozens of bar stations, a full restaurant, and a Wall of Fame with celebrity handprints.

SOUTHFORK RANCH

For thirteen years, television sets were tuned in to 356 episodes of Dallas, one of the longest running TV series in history. Viewers made themselves home at Southfork, the ranch the Ewings called home and where the world was a weekly guest. Today, Southfork continues to welcome visitors from around the world, who come to see where Dallas was filmed and to experience the lifestyle made famous by the Ewings. Whether you are an individual traveler or part of a group tour, Southfork is open Tuesday - Sunday (closed Mondays), year-round for guided tours of the ranch. Tour the famed Ewing Mansion and relive exciting moments from the series in the Dallas Legends exhibit, featuring an exciting array of memorabilia from the series.

CONFERENCE FEES

NGA Member Rates

Early Bird Discounted Registration if Received BEFORE September 3

Full Conference	$450
Sunday or Monday only	$200
Tuesday only	$100
Intensive: Legal & Legislative Review	$150
Intensive: Half-Day (each)	$100
Guardianship Investigators Program	$700

Regular Registration if Received BETWEEN September 3 and September 30

Full Conference	$475
Sunday or Monday only	$215
Tuesday only	$115
Intensive: Legal & Legislative Review	$165
Intensive: Half-Day (each)	$125
Guardianship Investigators Program	$700

Late Registration if Received AFTER September 30

Full Conference	$550
Sunday or Monday only	$240
Tuesday only	$140
Intensive: Legal & Legislative Review	$180
Intensive: Half-Day (each)	$150
Guardianship Investigators Program	$775

NGA Non-Member Rates

Early Bird Discounted Registration if Received BEFORE September 3

Full Conference	$575
Sunday or Monday only	$275
Tuesday only	$115
Intensive: Legal & Legislative Review	$165
Intensive: Half-Day (each)	$125
Guardianship Investigators Program	$700

Regular Registration if Received BETWEEN September 3 and September 30

Full Conference	$620
Sunday or Monday only	$290
Tuesday only	$140
Intensive: Legal & Legislative Review	$180
Intensive: Half-Day (each)	$150
Guardianship Investigators Program	$700

Late Registration if Received AFTER September 30

Full Conference	$695
Sunday or Monday only	$315
Tuesday only	$165
Intensive: Legal & Legislative Review	$205
Intensive: Half-Day (each)	$175
Guardianship Investigators Program	$775

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.

The guardianship investigators program fee includes entrance to all program sessions on Saturday, Sunday, Monday, and Tuesday; welcome reception and exhibitor reception; breakfast on Saturday, Sunday, Monday, and Tuesday; lunches on Sunday and Monday; and all breaks, as well as access to the program handouts.

Early bird 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.

NGA Registration Form
2022 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 September 3 for the early bird discount.
Late registration fees apply after September 30.

2022 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 Sept. 3

	NGA Member	Non-Member
Full Conference	$_____	$_____
Sunday only	$_____	$_____
Monday only	$_____	$_____
Tuesday only	$_____	$_____
Intensive: Legal & Legislative Review	$_____	$_____
Intensive: Starting Guardianship Bus.	$_____	$_____
Intensive: Diverting the Pipeline	$_____	$_____
Guardianship Investigators Program	$_____	$_____

Regular registration BETWEEN Sept. 3 and Sept. 30

	NGA Member	Non-Member
Full Conference	$_____	$_____
Sunday only	$_____	$_____
Monday only	$_____	$_____
Tuesday only	$_____	$_____
Intensive: Legal & Legislative Review	$_____	$_____
Intensive: Starting Guardianship Bus.	$_____	$_____
Intensive: Diverting the Pipeline	$_____	$_____
Guardianship Investigators Program	$_____	$_____

Late registration if received AFTER Sept. 30

	NGA Member	Non-Member
Full Conference	$_____	$_____
Sunday only	$_____	$_____
Monday only	$_____	$_____
Tuesday only	$_____	$_____
Intensive: Legal & Legislative Review	$_____	$_____
Intensive: Starting Guardianship Bus.	$_____	$_____
Intensive: Diverting the Pipeline	$_____	$_____
Guardianship Investigators Program	$_____	$_____

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, October 10. Cancellations after October 10 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.

6-8-22 RJ

CERTIFICATE OF ATTENDANCE ORDER FORM

National Conference on Guardianship
October 22 – 25 | Dallas, TX

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 is provided to all attendees and does not require purchase (unless late fees apply). The aforementioned certificate is accepted by the Center for Guardianship Certification and any state which accepts their approval. Certificate purchases are outlined below. (Please allow 30 days following verification code submission for receipt of certificate.)

Areas listed below require pre-approval or additional staff support. 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 Texas (or any other state that accepts Texas's approval)	$50.00
	Social Work	Certificate may be used for all states accepting NASW approval	$50.00
	Late Fee	Any certificate where code verification is submitted after November 4.	$25.00

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 _____

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.