NGA
NATIONAL GUARDIANSHIP ASSOCIATION

NATIONAL CONFERENCE ON GUARDIANSHIP

A Virtual Educational and Networking Event

October 19 - 21, 2020

Welcome to the National Guardianship Association's 2020 National Conference on Guardianship. This has been a year unlike any other in recent history. NGA feels strongly in offering the high-quality training and networking that has long defined an NGA conference experience. Of course, a virtual experience will be different, but NGA is dedicated to offering participants the education, interaction, and value that they have come to expect.

Here's what you can expect at this year's conference:

- *Quality education*: our outstanding presenters will discuss diverse topics related to guardianship. They will be available to answer questions during the sessions as well.
- *Access to **all** sessions*: all presentations, including general and breakout sessions, will be recorded; your conference fee provides access to these recorded sessions for one month following the conference. With one conference registration, you have the potential to earn all of the continuing education credits you need!
- *Networking and interaction*: our conference will offer the ability to meet with people from your region, and you can also invite your fellow participants to chat.
- *Flexibility*: the three conference days are shortened, allowing you to view as many or as few presentations as you wish in the live format, and return later to review anything you missed.

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

NGA NATIONAL GUARDIANSHIP ASSOCIATION

CONFERENCE SCHEDULE

Monday, October 19

All times listed are Eastern Daylight Time (EDT)

12:00 pm – 12:15 pm **Welcome and Virtual Conference Overview**

Becky Allred, NGA President and Wanda Bevington, Conference Committee Chair

12:15 pm – 1:45 pm **Dementia from the Inside Out**

The Very Rev. Tracey Lind, Episcopal Priest, Writer, Author, and Dementia Advocate Living with Frontotemporal Degeneration

Emily Ingalls, MBA, Care Partner to the Very Rev. Tracey Lind, Public Speaker, Writer, and Dementia Advocate

During a virtual interactive workshop with The Very Rev. Tracey Lind and her spouse, Emily Ingalls, learn tips and strategies the pair have gained by approaching Tracey's 2016 dementia diagnosis with a "live to the fullest" outlook. Through transparency, open communication, laughter, and a heavy dose of faith, both Ingalls and Lind offer refreshingly honest perspectives and authentic advice for individuals living with dementia and those who love them.

1:45 pm – 2:00 pm **Break**

Break time at this conference is your time. You may stay within the conference platform to visit NGA's conference sponsors or invite someone (or a group of people) into a chat for some networking. Or you can take a break from the conference to stretch, grab a snack, refresh your beverage, or return a call.

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

Getting to Yes! Empowering Choice and Autonomy Through Guardianship

Rachel Medina
LiveOak Living Community

"Getting to Yes" is specifically geared toward guardians looking to test their skills in supportive decision making. This presentation will discuss ethical issues such as dignity of risk and ways to balance safety and independence when working with persons under guardianship. This presentation will also focus on actionable planning and goal setting. Participants will learn how to create a strategy to help individuals achieve their goals with the assistance and input of their guardians.

Ten Red Flags: How to Review Investments as a Fiduciary

Darryl J. Lynch, AIF®
Oppenheimer & Co. Inc.

This presentation will cover a step-by-step guide to investing and monitoring investments as a fiduciary. We will discuss ten common red flags, when and where to look for them, and what to do when one is discovered. You will learn easy techniques to avoid these common mistakes and protect yourself from liability.

Enacting Guardianship Reforms: The Uniform Guardianship, Conservatorship, and Other Protective Arrangements Act

Diana Noel, MPA
AARP
Benjamin Orzeske, JD
Uniform Law Commission
Robert B. Nettleton, JD
Harlowe & Falk LLP

The Uniform Guardianship, Conservatorship, and Other Protective Arrangements Act is a comprehensive reform of state guardianship law. Join us to learn lessons from implementing UGCOPAA into one state's statutory code that you can use to enact UGCOPAA in your state.

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3:15 pm – 3:30 pm **Break**

3:30 pm – 4:45 pm **Concurrent Breakout Sessions**

End of Life Doula: Cradling Death

Marilyn A. Halpern, LSW
Aspen Guardianship & Care Services

The purpose of this presentation is to learn about the emerging role, education skills, and services of End of Life (EOL) doulas. This presentation will highlight a successful model of how guardians can partner with EOL doulas to provide robust plans of care and support for clients and families. Come to this engaging, interactive session to learn practical and concrete tips to ensure best practice.

The Messy Intersection Between Guardianship and Divorce

Bridget L. Mullins, Esq.
Pregenzer, Baysinger, Wideman & Sale, PC
Rex M. Swanda, Ph.D., ABPP-CN
Clinical Neuropsychologist, Private Practice

Perhaps surprisingly, the demographic experiencing the highest rate of divorce currently are people over the age of 65. The "grey tsunami" is coming, and with it an increasing number of cases involving both guardianship/conservatorship and divorce. The intersection of these two legal fields brings up some pressing challenges for practitioners in both areas.

Are You Using the Best Technology Tools to Help You Run Your Business?

Claire McDonnell
True Link Financial

As remote work becomes more common, organizations are seeking ways to replicate the work they did in an office. In this session, we'll share tools and strategies we've relied on to make our team more successful, effective and connected while working from home.

4:45 pm – 5:15 pm **Topic-Based Virtual Networking Time**

One of the highlights of an in-person conference experience is getting to know guardians across the country. Most attendees love getting to know others who understand the unique challenges of guardianship, and talking to people in other regions can be an eye-opening experience filled with new and innovative ways to serve people under guardianship. For this networking session, you will be assigned to a small group for some topic-based networking time, just like you might discuss your challenges and successes at your breakfast table at an in-person conference! To help us assign people to groups, you'll be asked to choose from a list of topics that interest you when you register.

5:15 pm **Conference Concludes for the Day**

While there will no longer be new content presented, the virtual platform will remain open for networking or reviewing sponsor content.

We didn't forget about new members and first-time attendees!

Are you a new member or first-time conference attendee? While the virtual format is new to all of us, we want to make our new members and first-time attendees feel welcome and excited for the education and networking being offered.

New members: If you joined NGA since the last conference, you'll be invited to a virtual meeting with NGA's leadership. We want you to fully understand your member benefits so that you can make the best use of your investment in membership.

First-time attendees: When you register, be sure to check the first-time attendee box on the registration form. This will allow us to invite you to a pre-conference networking event with NGA board members and seasoned guardianship professionals. This is a great way to make some connections, even before the conference begins.

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Tuesday, October 20

All times listed are Eastern Daylight Time (EDT)

11:00 am – 12:00 pm **Topic-Based Virtual Networking Time**

During this second opportunity for networking, you will be assigned to a group based on topics you indicate during registration. This is a great way to learn what others are doing with regard to topics that interest you.

12:00 pm – 12:15 pm **Welcome and NGA Updates**

Becky Allred, NGA President and Wanda Bevington, Conference Committee Chair

12:15 pm – 1:45 pm **Judges Panel**

Hon. Brenda Hull Thompson, The Probate Court of Dallas County, Texas
Hon. Brooke Allen, Tarrant County Probate Court No. 2, Texas
Hon. Karen Murphy Jensen, State of Maryland Judiciary
Hon. Philip Alan B. Mayer, Richland County Probate Court, Ohio
Moderated by Terry H. Hammond, Texas Guardianship Association

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

1:45 pm – 2:00 pm **Break**

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

Planning for a Good Life: Using Life-Course Person-Centered Planning in Guardianship Case Planning

Rebecca M. Pryor, MSM, NCG
Creative Approaches LTD
Heather Sorrells
Indiana Professional Management Group

Person-centered planning involves an approach and process for determining what individuals with disabilities or older adults need and want for their own futures. The workshop provides guardians with a LifeCourse training session for developing their person-centered thinking and planning skills.

Answering Difficult Questions: Developing Proper Skills to Put Guardianship's Best Foot Forward

Al Rothstein
Al Rothstein Media Services

As a guardian or someone in a guardianship-related profession, difficult questions are part of the landscape. Whether those questions come from the media, family members, courts, or people who may one day face guardianship for themselves or a loved one, your responses can be of critical importance. This session will help you develop strategies and skills on how to respond to difficult questions and put guardianship's best foot forward.

Writing a Care Plan: How to Determine Values and Wishes

Joyce McHugh, CCM, CM
Advocate Care Services

Writing a care plan can be a challenging process when our clients cannot communicate their wishes and values. The focus of this session is to understand how we are to determine what they value, and what their wishes would be.

3:15 pm – 3:30 pm **Break**

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3:30 pm – 4:45 pm **Concurrent Breakout Sessions**

Sexual Expressions Rights and the NGA Standards of Practice

Teresa Parks, MSW, NCG
Illinois Guardianship and Advocacy Commission

In 2019, after several disability rights complaints surrounding sexual expression rights, the State of Illinois passed legislation to require disability service providers to assess the need for and provide sex education for adults with disabilities. This presentation will share the legislative journey, the outcome, and the obstacles along the way, including fierce resistance by family guardians and how the NGA Standards of Practice and Ethical Principles facilitated the passage of the legislation, while also educating legislators on disability rights.

Lawyers, Guns & Money: Difficult Assets

Frank R. Acuña, JD
Acuña ❖ Regli LLP

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 session focuses on some of the most difficult assets with which guardians must deal, including:

- Pets and Pet Trusts
- Firearms
- Art & Collectibles
- Intellectual Property
- Vacation Homes (and Personal Residences)
- Farms, Ranches & Vineyards
- Multiple Jurisdiction Planning
- IRAs (and the Aftermath of the SECURE Act!)

There is more here than can be addressed in a single session. Therefore, we will poll the group and go down the list of participants' greatest need. *Note: Some of this material may have been covered in last year's conference intensive, but most of the session will feature new content.*

Guns and Guardianship: The Potential Loss of the Second Amendment Right to Bear Arms

Patricia Galindo, JD
Administrative Office of the Courts

This session will provide a general overview of the nine different federal firearms prohibitors and the National Instant Criminal Background Check System (NICS), the FBI's national background check system for gun sales. Participants will learn how New Mexico courts have balanced the federal firearms reporting requirement with ensuring individuals under guardianship are given notice of the firearm prohibition and the right to appeal the firearm prohibition.

4:45 pm **Conference Concludes for the Day**
While there will no longer be new content presented, the virtual platform will remain open for networking or reviewing sponsor content.

Wednesday, October 21

All times listed are Eastern Daylight Time (EDT)

12:00 pm – 12:15 pm **Welcome and NGA Updates**
Becky Allred, NGA President and Wanda Bevington, Conference Committee Chair

12:15 pm – 1:45 pm **Lessons Learned from the COVID-19 Pandemic**
Karen Digh Allen, Esq., NCG; Missouri
Mary Galvez, MA, CMC, NMG, CSA; New Mexico
Lisa Judkins, LMHC, NCG; Massachusetts
Cathy D. Mason, NCG; South Carolina
Moderated by Sally Balch Hurme, JD

Have a story to share? Contact us if you are interested in serving as a panelist for this presentation.

This year has ushered in a new era in every sense of the word. From social distancing to mask use, drive-by visits with family members to telemedicine, everything has changed, including the practice of guardianship. This session, still in development, will give panelists an opportunity to discuss ideas that worked well, ideas that didn't work so well, and the lessons learned along the way. The panel will be moderated by Sally Hurme, a member of the team that developed, and continues to revise, the *Frequently Asked Questions by Guardians About the COVID-19 Pandemic*.

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1:45 pm – 2:00 pm **Break**

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

Evaluating and Servicing the Ongoing Needs of the Special Needs Trust (SNT)

Jeremy Lau, CFA, CFP
Prudent Investors
Gary A. Powell, NCG, LUTCF, CDS
The Caregiver Foundation

This presentation will focus on meeting the financial needs of a special needs trust (SNT), which requires expertise that extends well beyond traditional financial management. We will discuss ways to use a person-centered planning approach for SNTs, how to create a spending plan, how to evaluate annuities and public resources, and how to manage a budget for protected persons over time.

Supporting Family Guardians Through Strategic Collaborations

Nisa C. Subasinghe, Esq.
Maryland Judiciary
Hon. Karen Murphy Jensen
State of Maryland Judiciary
Deborah S. Riley, LCSW-C, NMG
Baltimore County Department of Aging

Problems occur if family guardians do not understand their roles or are unaware of available resources. Learn how Maryland equips guardians with information and tools they need to be successful and how to achieve similar reforms through strategic multidisciplinary partnerships.

Supported Decision-Making: Autonomy for All

Carleton Coleman
Georgia Division of Aging Services
Dana Lloyd
Georgia Advocacy Office
John McCarty
Self-Advocacy Resource and Technical Assistance Center

Supported decision-making is an accommodation that enables people experiencing a variety of disabilities to make their own decisions with the help of trusted supporters. This interactive workshop will introduce the principles of SDM and explore its application to avoiding and/or reversing guardianship.

3:15 pm – 3:30 pm **Break**

3:30 pm – 4:45 pm **Choice of Educational Presentation or Networking**

Lessons Learned From the Fallout in Nevada From the April Parks Case

Debra A Bookout, Esq.
Legal Aid Center of Southern Nevada, Inc.
Susan Hoy, NCG
Nevada Guardian Services

Debra Bookout, attorney, and Susan Hoy, private guardian, will provide insight into Nevada's legislative reforms following the fallout from the April Parks case: the effect those reforms had on the administration of guardianship; and how building stakeholder relationships benefit the protected person.

Virtual Networking Opportunity

As the conference concludes, you may wish to continue a topic-related discussion from Monday afternoon or Tuesday morning, speak with someone who asked a great question during a session, view a demonstration by one of the conference sponsors, or gather some friends you've made at in-person conferences to catch up.

This is your opportunity to network and interact with your fellow conference participants however you wish.

4:45 pm **Final Remarks and Conference Conclusion**

While the live presentations will conclude at the end of the day on Wednesday, all sessions will be recorded. Beginning the week after the conference, participants will have access to recorded versions of all sessions. You can review a session you attended live, or watch sessions that you missed when presented live. Continuing education credit will be issued for all sessions attended: live or recorded. The conference platform will offer the recorded sessions through Tuesday, November 17.

NATIONAL CONFERENCE ON GUARDIANSHIP

LEGAL & LEGISLATIVE REVIEW

A Two-Part Presentation
Monday, October 26 and Tuesday, October 27
12:00 pm – 3:15 pm

Panelists:

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

In this two-day presentation, 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.

While part of the virtual conference platform, this session requires an additional fee. Participants do not have to register for the full conference to register for the *Legal & Legislative Review*. Registration includes a choice of printed or downloadable copy of the *2020 Legal & Legislative Review* book, a value of $85.00 (member price).

CONTINUING EDUCATION

Attendees participating in a live session each time one is offered can earn a potential of 12.0 credit hours. Participants who attend recorded sessions following the conference can earn up to 12.5 additional credit hours. Attending the *Legal and Legislative Review* adds another 6.0 credit hours. Because each accrediting body must approve the program prior to assigning credits, the specific number of credits accepted by each state and for each type of credit will not be definite until October. Keep in mind that not all hours will be deemed acceptable for all types of credit. Questions about continuing education credits can be sent to Kelly Dolan at **education@guardianship.org** 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 forms 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

While NGA typically applies to the conference's host state for CLE credits, it is unable to do so for a virtual conference. Individuals seeking legal credits should contact their state bar associations prior to the conference to determine the steps needed to receive credit. If you need assistance with supporting documents, please contact **education@guardianship.org**. A verified certificate is included in 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 code verification form promptly. Conference sessions will be available to view for one month following the conference, and forms will be accepted up to one week after the conference platform closes (November 17). Certificates can be downloaded online. All certificates ordered before the conference will be issued within 30 days of the close of the conference platform. Registered attendees will receive a virtual conference packet prior to the conference, and this document will include the most current continuing education information.

NATIONAL CONFERENCE ON GUARDIANSHIP

CONFERENCE FEES

NGA Member Rates

Full Conference	$350
Intensive: Legal & Legislative Review	$150

NGA Non-Member Rates

Full Conference	$475
Intensive: Legal & Legislative Review	$165

Company/Organization Group Rates

Company registering 6-10 attendees	$300 member rate
Company registering 11+ attendees	Contact NGA for pricing

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.

Information About Conference Fees

Registration for the Legal and Legislative Review: Conference registration and Legal & Legislative Review registrations are separate. Attendees are able to register for both events, or just one. Registrants will only have access to the sessions and materials for which they register and pay.

The full conference registration fee includes access to all live education and networking sessions on Monday, Tuesday, and Wednesday. Conference attendees may also visit the conference platform for one month following the conference to review recorded sessions.

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 conference registration. **The application deadline for all scholarships is Friday, August 21.**

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.

NGA Registration Form
2020 National Conference on Guardianship

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

Registration fees are available on the previous page. Registration Deadline is Friday, October 2

Registration Information:

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

_____
Name as you want it to appear in your virtual conference profile (if different)

_____
Agency/Organization/Company

_____
Mailing address

_____
City, State, Zip

_____
Phone and/or Cell phone if we need to reach you before or during the conference

_____
Email (Confirmations are only sent by email.)

❒ I am a family guardian.
❒ I am a first-time conference attendee.
❒ I am interested in participating in networking conversations about these topics (select all that apply)

- ❒ Supported decision-making
- ❒ Ethics
- ❒ Dealing with the media
- ❒ Avoiding that lawsuit
- ❒ Alternatives to guardianship
- ❒ Alzheimer's
- ❒ Public policy
- ❒ The VA
- ❒ General guardianship discussion
- ❒ Family guardians
- ❒ Conflicts of interest
- ❒ Managing difficult cases
- ❒ Investments
- ❒ Starting a guardianship business
- ❒ Difficult families
- ❒ The public guardian office
- ❒ WINGS

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

Mailing Information:

We do not anticipate needing to mail any materials prior to the conference. But if we do have something that must be mailed, we understand that not everyone is working in the office. Please list an address that we should use if we must mail something prior to the conference.

❒ Pre-conference mailing address is the same as above.

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

_____
Agency/Organization/Company

_____
Mailing address

_____
City, State, Zip

	NGA Member	Non-Member
Full Conference	$_____	$_____
Organization Group Registration	$_____	$_____
Intensive: Legal & Legislative Review	$_____	$_____

Legal Review choose one:
❒ Printed book shipped to your address
❒ Link to download to your computer or device

Additional Registration Options

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.

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

No refunds will be issued after Monday, October 5. Cancellations after October 5 will receive access to the virtual conference platform. 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
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Any person needing a Certificate of Attendance for the Center for Guardianship Certification or California Fiduciary Bureau WILL NOT need to purchase a certificate. A Verified Certificate of Attendance will be provided following the conference for every attendee who submits the Attendance Verification sheets. (Please allow 30 days following the close of the conference platform for receipt of certificate.)

For anyone seeking continuing legal education credit (CLE): Because the conference is not held in a specific state, anyone seeking legal credit must apply to his/her own state bar using the verified 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
	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.