



CONFERENCE SCHEDULE AT-A-GLANCE

(Conference Intensives Require Separate Registration)

Saturday, October 12

7:00 am - 5:00 pm Registration Area Open
 8:30 am - 4:00 pm Conference Intensive: Legal Review
 8:30 am - 11:45 am Conference Intensive: Guardianship Clinic
 10:00 am - 11:40 am Guardianship Scene Investigation
 1:00 pm - 4:00 pm State Affiliates Meeting
 2:45 pm - 4:25 pm Guardianship Scene Investigation
 5:30 pm - 6:30 pm Welcome Reception

Sunday, October 13

7:00 am - 5:00 pm Registration Area Open
 7:00 am - 8:30 am New Member Breakfast
 7:00 am - 8:30 am Continental Breakfast
 8:30 am - 8:45 am Welcome/Opening Remarks
 8:45 am - 10:00 am NGA Advocacy and Grassroots Training
 10:00 am - 10:30 am Break/Visit with Exhibitors
 10:15 am - 11:55 am Guardianship Scene Investigation
 10:30 am - 11:45 am Concurrent Breakout Sessions:
 • Let's Talk About Planning Ahead
 • UAGPPJA through Advocacy
 12:00 pm - 1:45 pm Annual Meeting Luncheon
 2:00 pm - 3:15 pm Concurrent Breakout Sessions:
 • Restoring Lives: An Integrated Approach to improving quality of life for victims of Elder Financial Abuse
 • A Path Through the Woods: Navigating the Complex World of Government Benefits
 3:15 pm - 3:45 pm Break with Exhibitors
 3:45 pm - 5:30 pm Guardianship Scene Investigation
 3:45 pm - 5:00 pm Concurrent Breakout Sessions:
 • Establishing a Place of Abode: A Person-Centered Approach to Meet the Challenge of the NGA Code of Ethics Rule #3
 • Making Rational Medical Decisions
 5:30 pm - 7:00 pm Reception with Exhibitors and Live Auction
 7:00 pm Dinner on Your Own
 7:15 pm - 8:30 pm Master Guardian Prep Session

Monday, October 14

7:00 am - 5:00 pm Registration Area Open
 7:30 am - 8:30 am Continental Breakfast with Exhibitors
 8:30 am - 9:30 am Human Rights & Guardianship: Individuals with Developmental Disabilities
 9:30 am - 10:00 am Break with Exhibitors
 10:00 am - 11:00 am Concurrent Breakout Sessions:
 • Protecting the Guardian from Liability
 • One of Our Greatest Challenges....Communicating and Coping with Challenging Families
 10:15 am - 11:55 am Guardianship Scene Investigation
 11:15 am - 12:30 pm Concurrent Breakout Sessions:
 • Everything you need to know about the Health Insurance Marketplace for your business and your clients
 • Federal and State Legislative Developments
 12:30 pm - 1:00 pm Networking Luncheon
 1:00 pm - 1:45 pm Dessert with Exhibitors
 2:00 pm - 3:15 pm Concurrent Breakout Sessions:
 • Ethics Jeopardy
 • Behavior Related to Brain Injury "Who is this Person?"
 3:15 pm - 3:45 pm Break
 3:45 pm - 5:00 pm Concurrent Breakout Sessions:
 • Attorneys as Guardians: Ethical Dilemmas and Precautions
 • Lesbian, Gay, Bisexual and Transgender Issues in Aging
 Open Evening Evening on Your Own

Tuesday, October 15

7:00 am - 11:30 am Registration Area Open
 7:00 am - 8:30 am Continental Breakfast
 8:30 am - 9:45 am What to Expect from the Court: Key Elements of the Revised National Probate Court Standards
 9:45 am - 10:00 am Break
 10:00 am - 11:30 am VA's Fiduciary Program
 11:30 am Conference Adjourns

Special Thanks for the Leadership and Dedication of the Volunteers whose Vision has Made this Conference Possible

The NGA Board of Directors

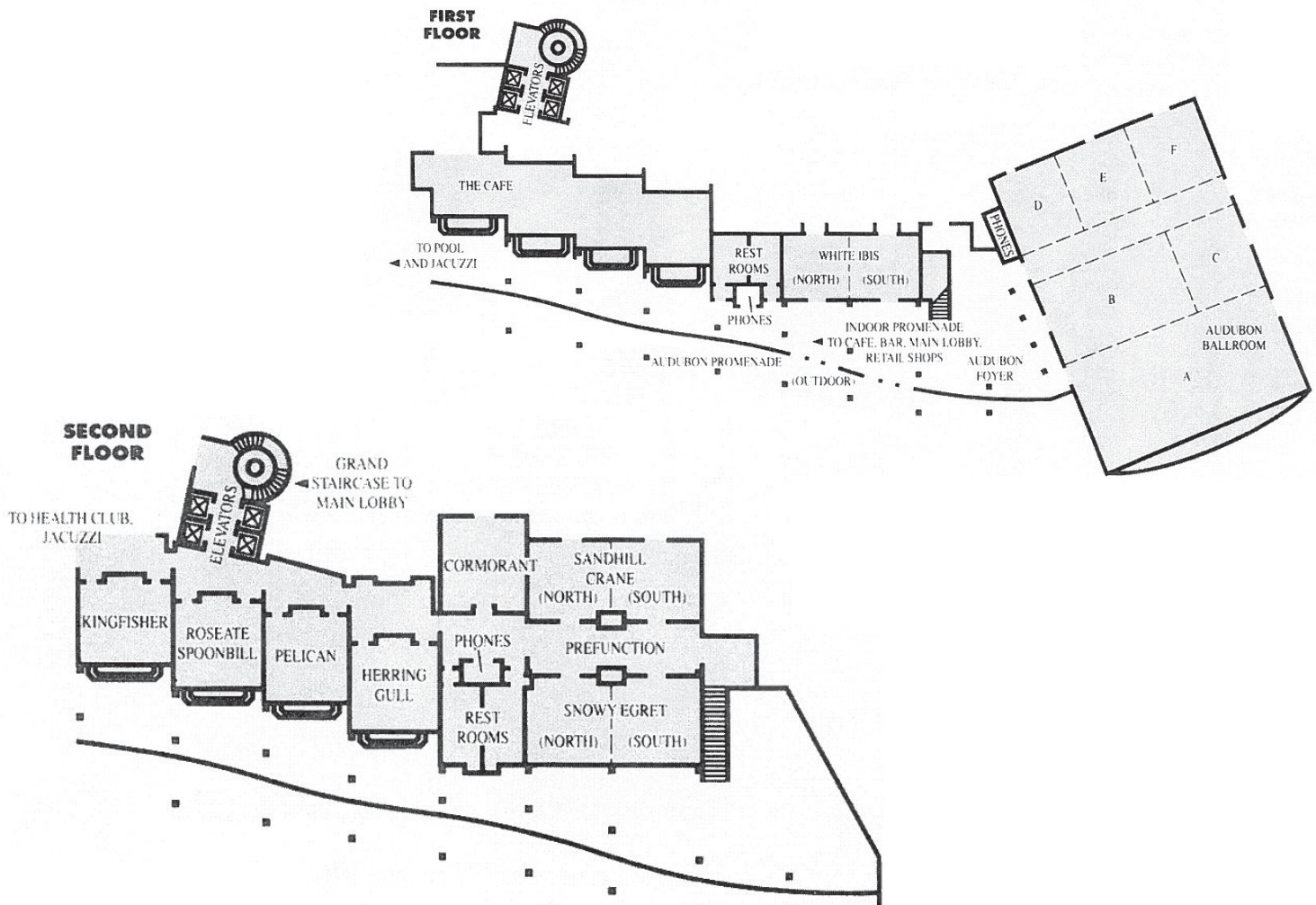
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CONFERENCE MEETING ROOMS



SATURDAY, OCTOBER 12

Registration Area Opens 7:00 am – 5:00 pm

CONFERENCE INTENSIVES

Sessions prior to the Welcome Reception are not included in the Full Conference Registration. An additional registration fee applies to attend one of these programs and attendance is monitored.

Legal Review

8:30 am – 4:00 pm • Snowy Egret

Edwin M. Boyer, Esq., Boyer Jackson Bowmar & Boyer, PA
Rebekah Diller, Cardozo School of Law, Guardianship Clinic
Meredith L. Grocott, Esq., Schenck, Price, Smith & King, LLP
Cynthia McCormick, Esq.

Rebecca C. Morgan, Stetson University College of Law
Erica Wood, Esq., American Bar Association Commission
on Law and Aging

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.

Guardianship Scene Investigation: To Walk in the Shoes of the Person under Guardianship

Saturday 10:00 am – 11:40 am • White Ibis or Trailer

Saturday 2:45 pm – 4:25 pm • White Ibis or Trailer

Sunday 10:15 am – 11:55 am • White Ibis or Trailer

Sunday 3:45 pm – 5:30 pm • White Ibis or Trailer

Monday 10:15 am – 11:55 am • White Ibis or Trailer

Theresa Barton, Guardian Care Management & Benefits Services, Inc.

One of the most difficult challenges as a professional guardian is to have vast knowledge of the person under guardianship. One way to obtain this knowledge is to understand the meaning behind items found among the person's property. What is each item's purpose, relevance, and priority? What action should be taken when coming across this item? Is it important? If so, why? What needs to be done with this thing? How do you do it? Whom can you ask?

This course provides attendees with hands-on experience interacting in a simulated environment with dozens of physical items, documents, medical assistance, durable medical equipment items, personal history clues, hidden treasures, financial records, cultural indicators, lifestyle choices and much more.

Guardianship Clinic

8:30 am – 11:45 am • Sandhill Crane

Vicki Alkire, NMG, Viable Alternatives

Sally Hurme, JD, AARP

M. Jean Krahn, NMG, Kansas Guardianship Program

This session is your chance to share your difficult situations and learn from your colleagues how to tackle all those hard decisions you have to make every day. This positive and highly interactive session brings to life how we are all working together to provide quality guardianship services.

ALSO ON SATURDAY

1:00 pm – 4:00 pm • Sandhill Crane

NGA State Affiliates Council

Attendance is by invitation only.

5:30 pm – 6:30 pm • Audubon Ballroom

Welcome Reception

All Conference attendees are invited!

PLEASE NOTE:

If you registered for the GSI session before arriving, you should have received your designated date, time and location. If you misplaced this information, it is available at the Conference registration desk. If you did not sign up before you arrived, check at the registration desk to see if space is available in any of these sessions.

CONFERENCE DETAILS

Taking the Wealth Home

Speakers are asked to provide handouts in advance. When you arrive at the Conference, you will receive a flash drive with the materials that were supplied by the deadline, catalogued to make it quick and easy to locate information when you return home. The drive will also have speakers' contact information, allowing you to reconnect and continue discussions after the conference.

Special Needs/Disabilities

People with disabilities or those having special dietary requirements were asked to notify NGA in advance. If you did not indicate on your registration form that you have special needs, please let us know as soon as possible. We cannot guarantee to accommodate onsite requests.

Conference Attire

Meeting room temperatures and personal preferences vary widely. Please dress for your personal comfort.

Name Badges

Wear your name badge to all Conference functions. Your badge serves as your ticket to all sessions and to meal functions that are included as part of your registration fee.

Guest Policy for Food Functions

A spouse or guest may join you at Saturday's Welcome Reception and Sunday's Exhibitor Reception. Other Conference meals (breakfasts, lunches and breaks) are *only* for those with a paid registration.

SUNDAY, OCTOBER 13

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

7:00 am – 8:30 am • Sandhill Crane

New Member Breakfast

A welcome gathering for those who have joined NGA since the last Conference.

7:00 am – 8:30 am • Tent

Continental Breakfast

7:00 am – 8:30 am • Cormorant

Florida State Guardianship Association Breakfast

FSGA members may take some breakfast from the tent and then come to the Cormorant Room for "Breakfast with Brian," a chance to hear from NGA's Brian Lindberg about political issues impacting Florida.

8:30 am – 8:45 am • Tent

Welcome/Opening Remarks

8:45 am – 10:00 am • Tent

NGA Advocacy and Grassroots Training

Robert Blancato, Elder Justice Coalition and Brian Lindberg, National Guardianship Association

Our co-presenters will share their insights and personal experiences in advocacy. Topics will include: how the legislative process really works, effective communication with staff and elected officials, using technology and available resources and why advocacy is important to add to our otherwise busy lives.

10:00 am – 7:00 pm • Ballroom B/C and Foyer

Silent Auction Display

10:00 am – 10:30 am • Ballroom B/C and Foyer

Break – Exhibits Open

10:15 am – 11:55 am • White Ibis or Trailer

Guardianship Scene Investigation

You must be pre-registered for this session.

10:30 am – 11:45 am

Concurrent Breakout Sessions

Breakout Option 1 • Ballroom A

Let's Talk About Planning Ahead

Phoebe Ball, JD, Disability Rights Florida and Melinda Coulter, State of Florida Agency for Persons with Disabilities

Come to this presentation to gain a better understanding of self-determination, person-centered planning and personal outcomes. You will receive resources and forms to help you guide persons with disabilities to plan ahead, whether the person in your life is transitioning to adulthood, well into middle age or aging gracefully!

Breakout Option 2 • Ballroom D/E/F

UAGPPJA through Advocacy

Lani Kawamura, AARP; David McNally, AARP; Diana Noel, MPA, AARP; Michael Splaine, Splaine Consulting; and Tim Summers, MPA, AARP

Fourteen states have yet to pass UAGPPJA. Learn about AARP's UAGPPJA campaign to remove the barriers in those states that prevent guardians from serving their clients, regardless of where they live.

12:00 pm – 1:45 pm • Tent

Lunch and Annual NGA Membership Meeting

2:00 pm – 3:15 pm

Concurrent Breakout Sessions

Breakout Option 1 • Ballroom A

Restoring Lives: An Integrated Approach to Improving Quality of Life for Victims of Elder Financial Abuse

Kevin Burke, NCG, Beagle, Burke & Associates

Rebuilding lives shattered by elder financial abuse takes a unique combination of skills. Forensic review of finances, legal advocacy and person centered planning can be integrated to let elders facing shock, loss and depression find creative ways to thrive and enjoy the remainder of their lives.

Breakout Option 2 • Ballroom D/E/F

A Path Through the Woods: Navigating the Complex World of Government Benefits

Laurie E. Ohall, Law Offices of Laurie E. Ohall, P.A. and Lauren Sherman, NMG, Lifecare Innovations, Inc.

This presentation will provide an overview of government entitlements including Medicare, Medicaid and VA benefits. Participants will learn how to navigate through the system in order to maximize resources for their clients.

3:15 pm – 3:45 pm • Ballroom B/C and Foyer

Break with Exhibitors

3:45 pm – 5:30 pm • White Ibis or Trailer

Guardianship Scene Investigation

You must be pre-registered for this session.

3:45 pm – 5:00 pm

Concurrent Breakout Sessions

Breakout Option 1 • Ballroom A

Establishing a Place of Abode: A

Person-Centered Approach to

Meet the Challenge of the NGA

Code of Ethics Rule #3

Terry W. Hammond, Esq., Terry W. Hammond Consulting; and Dr. Orit Simhoni, Dynamic Learning Online, Inc.

We describe non-adversarial and litigious strategies for person-centered discharge from facility to community. We review a class-action suit in which a person under guardianship is a plaintiff, asserting his right under ADA to live in the most appropriate integrated setting.

Breakout Option 2 • Ballroom D/E/F

Making Rational Medical Decisions

Irene Rausch, NMG

Making medical decisions for another person can be an overwhelming task. This presentation will offer suggestions on the issues that need to be considered and evaluated before providing consent or refusing treatment on behalf of another person.

5:30 pm – 7:00 pm • Ballroom B/C and Foyer

Reception with Exhibitors and Live Auction

7:00 pm • Dinner on Your Own

7:15 pm – 8:30 pm • Ballroom A

Master Guardian Prep Session

Thinking about taking the NMG exam? This session is your opportunity to discuss what would help you be best prepared for the exam.

Find Treasure at NGA's Auctions!

Silent auction bidding runs from 10:00 am on Sunday until 1:45 pm on Monday. The exciting Live Auction will be held during Sunday's reception in Ballroom B/C and Foyer. Through donated items, the auction raises money that is used by NGA to fund Conference scholarships and other special projects.

MONDAY, OCTOBER 14

Registration Area Opens 7:00 am – 5:00 pm

7:00 am – 8:30 am • Ballroom B/C and Foyer
Continental Breakfast with Exhibitors

8:30 am – 9:30 am • Tent
Human Rights & Guardianship: Individuals with Developmental Disabilities

Simon Azavedo; Jane Gildersleeve, Family Guardian; and Dr. Joan Kakascik, Psychologist

Our private practice panelists will share their thoughts that human rights are universal—the same for all people. Human rights apply to people with developmental disabilities whether or not the individual has a guardian. The guardian supports the client's human rights and responsibilities.

9:30 am – 10:00 am • Ballroom B/C and Foyer
Break with Exhibitors

10:00 am – 11:00 am
Concurrent Breakout Sessions
Breakout Option 1 • Ballroom A

Protecting the Guardian from Liability

Scott MacDonald, CSNA, Merrill Lynch Fiduciary & Special Needs Group; Russ Marshall, NMG, Marshall Fiduciary Services; and Peter Myers, Esq., Myers Urbatsch P.C.

Our panel will discuss strategies for limiting the guardian's liability, including: Waivers and Consents to Action; Notice of Proposed Action; Petition for Instructions. A guardian must manage the most important decisions for the care of people who are elderly or disabled.

Breakout Option 2 • Ballroom D/E/F

One of Our Greatest Challenges....Communicating and Coping with Challenging Families

Rosanne Patchey and Wendy Wells-Chanampa, Senior Resource Consultants, Inc.

One of our greatest challenges....communicating and coping with challenging families will be explored and experienced. Participants will be encouraged to develop personal strategies through examples, discussion and role playing.

10:15 am – 11:55 am • White Ibis or Trailer
Guardianship Scene Investigation

You must be pre-registered for this session.

11:15 am – 12:30 pm
Concurrent Breakout Sessions
Breakout Option 1 • Ballroom A

Everything you Need to Know about the Health Insurance Marketplace for your Business and your Clients

Sally Hurme, JD, AARP

If you have clients without health insurance or you want coverage for your employees, here's how you can enroll in the new health insurance plans through a Health Insurance Marketplace.

Breakout Option 2 • Ballroom D/E/F

Federal and State Legislative Developments

Brian Lindberg, National Guardianship Association and Ellen Murray, Charleston Premier Properties

Our co-presenters will bring you up to speed on NGA's legislative work and other hot health and aging legislation at the federal level. Learn the latest details on the budget, entitlement and tax reform.

12:30 pm – 1:45 pm
Networking Luncheon • Tent
Dessert with Exhibitors • Ballroom B/C and Foyer

2:00 pm – 3:15 pm
Concurrent Breakout Sessions
Breakout Option 1 • Ballroom A
Ethics Jeopardy

Frank R. Acuña, Esq., Acuña, Regli & Klein, LLP and Loren R. Acuña, The Ace Fiduciary Group

Join the next best thing to Alex Trebeck as you navigate fiduciary ethics! Topics will include, "Those Pesky Attorneys", "Duck and Cover", "Funny Business", "The Family", and others. And remember, your response must be in the form of a question! New and Improved for 2013, with Team Mode!

Breakout Option 2 • Ballroom D/E/F

Behavior Related to Brain Injury: "Who is this Person?"
Debbie Coleman, Florida Institute for Neurological Rehabilitation

This session will help you to understand what a TBI is; how to treat, work and live with someone who has had a TBI and also, what options are available for treatment.

3:15 pm – 3:45 pm • Ballroom Foyer
Break

3:45 pm – 5:00 pm
Concurrent Breakout Sessions
Breakout Option 1 • Ballroom A

Attorneys as Guardians: Ethical Dilemmas and Precautions
Kristin K. Woods, Esq., Owl Guardianship and Elder Care Services, LLC

Attorneys act in a plethora of roles for their clients: advisor, advocate, therapist. Should guardian be one of them? A quandary of ethical dilemmas present themselves and will be examined in this presentation.

Breakout Option 2 • Ballroom D/E/F

LGBT Inclusion Within the Aging Services Network

Douglas Carl, Georgia Department of Human Services

The network of publicly funded aging services is intended to create a baseline safety net for older adults, with an emphasis on those most socially and economically vulnerable. Access to these services is often non-welcoming and/or non-accepting of Lesbian, Gay, Bisexual, Transgender (LGBT) older adults. Best estimates predict that at the height of the aging boom (2010-2030), the population of LGBT elders will range from 2 to 7 million. Greater education and awareness of this often hidden and underserved elder population is needed. Cultural competency training has not only promoted greater awareness of this underserved population, but has also prompted service providers towards creating safe and welcoming environments for LGBT elders.

Open Evening

Enjoy Tampa!

Make the Exhibits Work to Your Advantage!

- NGA's Conference exhibitors are expecting to create another learning opportunity for you and they will be prepared for your questions.
- The exhibit area opens on Sunday morning and a highlight of the day will be the Reception with Exhibitors on Sunday evening. Monday's opportunity to visit exhibitors starts with a continental breakfast and concludes with your favorite desserts following lunch.
- Breaks are also in the exhibit area so that you can visit with these professionals while you relax between sessions.

TUESDAY, OCTOBER 15

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

7:00 am – 8:30 am • Ballroom Foyer
Continental Breakfast

8:30 am – 9:45 am • Ballroom A/B/C
What to Expect from the Court: Key Elements of the Revised National Probate Court Standards
Dr. Brenda K. Uekert, National Center for State Courts and Honorable William J. Self, National College of Probate Judges

In 2013, a revised version of the National Probate Court Standards was released (replacing the 1993 Standards). This presentation will discuss the purpose of the standards, how they were developed, how they might be used, how they are related to other sets of recommendations, uniform laws, etc., and some provisions that might be of particular interest to NGA members.

9:45 am – 10:00 am • Ballroom Foyer
Break

10:00 am – 11:30 am • Ballroom Foyer
VA's Fiduciary Program

David R. McLenachen, Department of Veteran's Affairs
Members of VA's national fiduciary staff will present information pertaining to VA's recognition of federal fiduciaries and court-appointed guardians, and the unique responsibilities associated with this recognition. The issue of incompetency for VA purposes will also be addressed. Time will be allocated for questions.

11:30 am
Conference Adjourns

SPECIAL THANKS TO

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Document Your Attendance to Earn Continuing Education Credits

Please review your entire Conference Packet for additional CEU information. Important CEU details are provided on the neon pink pages in the Conference Packet.

Proof of Attendance (Important, Please Read!)

Due to verification requirements, NGA will announce two codes during each session: one at the beginning and another during the session. Codes **MUST** be entered on attendance verification sheets (bright green packet) 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.

Guardianship Credits

NGA's Conference is approved for guardianship continuing education credits by the Center for Guardianship Certification, California Fiduciary Bureau and Texas Guardianship Certification. The verified certificate is accepted as proof of attendance for these organizations. NGA has also applied 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

Please note that NGA ONLY submitted for Continuing Legal Education in Florida. Please check with your State Bar for information on how to use the NGA conference for CLE credits. Certificate fees apply to receive a legal certificate. A verified certificate is included with the Conference fee.

Social Work Credits

NGA applied for social work credits with the NASW and any states that do not accept NASW certification. For a certificate documenting the pre-approved social work credits, a fee will be required.

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 preapproval.

To issue your certificate in a timely manner, NGA must receive your Attendance sign-in sheets (enclosed in the Conference Packet) before you leave the Conference. Certificates are downloaded online. All certificates ordered before the Conference will be issued within 45 days of the Conference. Check your Conference packet to obtain the most current Continuing Education information.

Questions about continuing education credits can be sent to Kelly Dolan at education@guardianship.org or you can call NGA at 877-326-5992, ext. 2.