

# The National Guardianship Association Presents



## 2009 National Conference on Guardianship

OCTOBER 3-6 • LAS VEGAS, NV

A tough economy isn't the time to bury your head in the sand...when things get tough the best of the best dig down and find ways to be even better. Our Conference theme epitomizes that attitude and our program is in the finest tradition of NGA's mission to improve the quality of guardianship.

NGA's Conference on Guardianship is the only national program that merges education, networking, personal development, and motivation into an event specifically tailored for guardians, conservators and fiduciaries. The vibrancy of Las Vegas adds just the touch of energy to complement this annual gathering of committed and engaged leaders of our profession.

From the Welcome Reception on Saturday until adjournment at noon on Tuesday, Mining for Excellence is pure dynamite. This year's featured speakers offer messages that drill down into the basics of improving your practice and create a silver lining in your life. The 12 breakout sessions will light the fuse to uncover pay-dirt for every level of experience and interest. The time you share interacting with your peers from around the country will be among your most rewarding memories, as well as providing terrific nuggets of information.

Each year attendance at NGA's Conference on Guardianship brings together a broader wealth of information for you to share in. We look forward to having you with us in 2009.

Kathleen A. Buchanan, NCG  
Conference Chair  
Las Vegas, NV

Vicki V. Alkire, NMG  
NGA President  
Sarasota, FL

[www.guardianship.org](http://www.guardianship.org)  
877-326-5992 / [info@guardianship.org](mailto:info@guardianship.org)



# Registration Form: 2009 Conference on Guardianship

To ensure accurate information is recorded, please use one form to register each individual.

Form may be photocopied and total fee may be paid with one check or credit card.

Register by **September 1** for the **Early Bird Discount**

## 2009 CONFERENCE REGISTRATION

### Early Bird, if Registering SEPTEMBER 1 OR BEFORE:

#### NGA Member Fees

Full Conference @ \$380	\$ _____
Sunday Only @ \$175	\$ _____
Monday Only @ \$175	\$ _____
Tuesday Only @ \$75	\$ _____

#### Non-Member Fees

Full Conference @ \$550	\$ _____
Sunday Only @ \$250	\$ _____
Monday Only @ \$250	\$ _____
Tuesday Only @ \$90	\$ _____

Total Payment for Conference Registration \$ \_\_\_\_\_

### If registering AFTER SEPTEMBER 1:

#### NGA Member Fees

Full Conference @ \$420	\$ _____
Sunday Only @ \$190	\$ _____
Monday Only @ \$190	\$ _____
Tuesday Only @ \$90	\$ _____

#### Non-Member Fees

Full Conference @ \$595	\$ _____
Sunday Only @ \$265	\$ _____
Monday Only @ \$265	\$ _____
Tuesday Only @ \$115	\$ _____

Total Payment for Conference Registration \$ \_\_\_\_\_

## PRE-CONFERENCE INTENSIVE REGISTRATION

(Note: Your registration applies to a Specific Session.)

### INDICATE THE SESSION OF YOUR CHOICE:

- People with Intellectual Disabilities and Problematic Behavior: Legal, Ethical, Assessment & Treatment Considerations
- 2009 NGA Legal Review

### Early Bird, if Registering SEPTEMBER 1 OR BEFORE:

NGA Member Fee @ \$125	\$ _____
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Non-Member Fee @ \$150	\$ _____
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### If Registering AFTER SEPTEMBER 1:

NGA Member Fee @ \$150	\$ _____
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Non-Member Fee @ \$175	\$ _____
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Use the separate form to order and pay for a Certificate of Attendance prior to the Conference.

If any person registered on this form requires a certificate to verify attendance, attach the separate form to place that order. The entire combined fee can be paid on this form with one check or credit card. NOTE: Each attendee will be provided a generic Certificate of Attendance that will be accepted for recertification by the Center for Guardianship Certification, California Fiduciary Bureau, and Texas Guardianship Certification

Complete Name (Please print clearly)

Name as you want it to appear on your name badge

Company or Agency/Organization

Mailing Address

City State Zip Code

Daytime Phone Fax

Email (Confirmations will only be sent by email.)

- I am a family guardian. Please have someone contact me about opportunities at the conference.
- I have a special dietary need. Please contact me.
- I have a disability and require special accommodations in order to fully participate in this meeting. Please contact me.

### What Your Registration Includes --

Each Conference registrant will receive a CD containing all papers and handouts submitted by the speakers, as well as:

**Full Conference Registration** - Entrance to all education sessions on Sunday, Monday, and Tuesday; Welcome Reception Saturday; Reception on Sunday, group lunches on Sunday and Monday, as well as continental breakfast each session day and all session breaks.

**One Day Registration** - The sessions on the day of your choice with accompanying continental breakfast, lunch, and breaks. Sunday's one day registration includes the reception that evening.

**Pre-Conference Intensive** - Training & materials just for the specific session you select, continental breakfast and breaks. Lunch on your own.

## REGISTRATION PAYMENT (Our Federal ID #: 36-3591860)

**TO MAIL** payment, make check or money order payable to National Guardianship Association and send with a completed registration form to:

NGA, 174 Crestview Drive, Bellefonte, PA 16823  
(Toll Free: 877-326-5992 / info@guardianship.org)

**OR FAX** the application form with credit card payment noted below to the NGA Registration Office:

Fax: 814-355-2452

Credit Card Information:  Visa  MasterCard

Name on card (print)

Account Number

Exp. Date Signature

**TOTAL PAYMENT FOR REGISTRATION, TICKETS, AND/OR CERTIFICATE** \$ \_\_\_\_\_

No refunds will be issued after Monday, Sept. 21, 2009. However, cancellations after Sept. 21 will receive a copy of the Conference materials. Changes or cancellations must be made in writing to Terri Breon at info@guardianship.org. Substitutions may be made.



## Guardians, Fiduciaries and Conservators Network At NGA's Conference with:

- ◆ Professionals
- ◆ Family Guardians
- ◆ Volunteers
- ◆ Attorneys
- ◆ Social Workers
- ◆ Case and Care Workers
- ◆ Public and Private Fiduciaries
- ◆ Discharge Planners
- ◆ Bank Trust Officers
- ◆ Representative Payees
- ◆ Judges
- ◆ Court Staff
- ◆ Others interested in guardianship and surrogate decision-making issues

## Combine the Best in Education with the Best in Travel in Vivacious Vegas



NGA's Conference program will keep your mind engaged and light-up a wealth of new ideas, but during the down time it's the atmosphere of Las Vegas that will get your heart really thumping.

Everywhere you turn, you'll find something extraordinary to see or do. Circus performers fly overhead in one venue, while singing cowgirls entertain customers in another. In need of a thrill or two? Ride a roller coaster a thousand feet in the sky. Or, for a change of pace, enter the sanctuary of a gallery for some of the world's finest works of art.

While NGA will keep you busy from dawn to dusk, there are endless possibilities for entertainment during your free hours. And since "the Strip" is nearby you may want to join the people in the thousands who simply walk up and down enthralled with magnificent hotels that glow, neon and electric lights flashing, music playing, fountains soaring and even volcanoes erupting. A laser beam, visible from space, penetrates the night sky, inviting the whole universe to come and play.

You also will be at no loss for fine dining and great shopping. Vegas is enjoying a culinary renaissance as talented chefs flock to the city and Las Vegas Boulevard South is more than just a playground - it's one of the world's great shopping streets.

You'll find so much to see and do, with a multitude of outstanding attractions, events, tours, shopping, restaurants, and live entertainment, that NGA's Conference could just be a great start to an extended vacation.

The fun can even begin before you arrive if you go to the official tourist website and "create your own identity" to take with you on the trip or order your copy of the Visitors Guide at: [www.visitlasvegas.com](http://www.visitlasvegas.com)



## Rio All-Suite Hotel

3700 Flamingo Road  
Las Vegas, Nevada 89103  
[www.riolasvegas.com](http://www.riolasvegas.com)

If any hotel embodies the rhythm and spirit of Las Vegas, it is the Rio, where the atmosphere pulses with activity, color and uninhibited excitement. Get swept up in the Rio's vibrant backdrop: every room a suite, every turn a new adventure, every need fulfilled. Suites at the Rio provide spectacular views of Las Vegas and offer more than 600 square feet of spacious luxury, including a data line, high-speed Internet, and 32-inch TV.

### NGA's Discounted Group Rate Concludes Tuesday, September 8, 2009 or sooner if the block fills before Sept. 8

**Discounted NGA Rate:** \$139 single/double occupancy, plus local taxes (anticipated at 12%). Add a \$30 per person charge for third and fourth occupants in a room.

**Reservations by Phone:** Call toll free at 888-746-6955 and use the voice activated system for Reservations. Be sure to request NGA group code: SRNGA9 You must identify yourself using the group code to obtain the NGA rate. It is also important that you indicate any special rooming needs or arrangements at the time of this call.

**Online Reservations:** To obtain NGA's group rate go to - <http://www.harrahs.com/CheckGroupAvailability.do?propCode=RLV&groupCode=SRNGA9>

**NGA cannot guarantee room availability:** NGA has contracted for a set block of rooms at the discount rate. The hotel reserves rooms in the block on a first come/first served basis. Once our block fills, the discount ends even if it is before September 8. That date is not a guarantee of room availability. After the block fills or after Sept. 8 (whichever comes first) all reservations are taken on a space and rate available basis. For those making reservations prior to the deadline, rooms may be available at the group rate on the three days prior to and the three days after the actual Conference.

**Hotel Policies:** Check-in: 4:00 pm; Check-out: 11:00 am. Reservations require a valid credit card number or one night's advance deposit. You have the right to cancel up to seventy-two (72) hours prior to the scheduled arrival date without penalty.

**Transportation:** McCarran International Airport (LAS) is 4.5 miles from the Rio. Drive time is approximately nine minutes depending on traffic. The hotel does not offer an airport shuttle. A variety of shuttle/limousine services are located on the west side of the airport baggage claim, outside door exits 7-13. Showtime Tours Shuttle Express Service is available 24 hours daily for \$6 one way and \$12 round trip. For shuttle return to the airport a reservation will need to be made. Showtime Tours can be reached at 702-895-9976. Rental cars and taxis are also available. Driving directions are available on the hotel's website. Parking is complimentary for hotel guests. The Rio and its sister properties, Paris and Harrah's Las Vegas on the Las Vegas Strip do have a complimentary shuttle that runs between the hotels every 30 minutes depending on traffic conditions.

## SATURDAY, OCTOBER 3, 2009 -- PRE-CONFERENCE EVENTS

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

### PRE-CONFERENCE INTENSIVES

*These sessions are not included in the Conference fee.  
An additional fee applies to attend one of these programs.*

#### People with Intellectual Disabilities and Problematic Behavior: Legal, Ethical, Assessment and Treatment Considerations

**Saturday, October 3 / 8:30 am - 3:30 pm**

(Continental breakfast available 8:00 - 9:00 am; Lunch is on your own.)

Phillip Baier, LCSW  
Baier Counseling & Consulting

Brian Lech, Ph.D., JD  
Brian Lech, Esq.

The presenters will discuss the strengths and weaknesses of traditional methods used in the assessment of developmental disabilities. Included will be a discussion about the Abel-Blasingame Assessment System for individuals with intellectual disabilities. Also included will be ABID, a derivative of the Abel-Blasingame Assessment, for sexual interest.

#### NGA 2009 Legal Review

**Saturday, October 3 / 8:30 am - 3:30 pm**

(Continental breakfast available 8:00 - 9:00 am; Lunch is on your own.)

*Moderator:*

Terry W. Hammond, Esq., NCG  
NGA Executive Director and Creator of the NGA Legal Review

*Panelists will include:*

Steven D. Fields, Esq.  
Tarrant County Probate Court #2

James M. O'Reilly  
James M. O'Reilly, LLC

Ira Salzman, Esq.  
Goldfarb Abrandt Salzman & Kutzin LLP

John H. Wank, Esq., NCG  
Illinois Guardianship & Advocacy Commission

A panel of guardianship attorneys categorize and review the year's major U.S. guardianship cases under the following topics: pre-adjudication issues; choice of guardian; guardians' actions; fees for guardians and attorneys; rights of wards; capacity issues; power of attorney v. guardian conflicts; Medicaid/public benefits; end of life issues; guardian and fiduciary misconduct; post-adjudication issues; and multi-jurisdictional issues. This is an interactive session where attendees may ask questions and will hear from practitioners about how reported cases in their states have affected their practices.

### Review Course and Certification Exams

*(Separate Registration Required)*



*The Review Course is conducted by the  
National Guardianship Association*

NGA will offer the national Certification Review Course prior to the National Certified Guardian Exam. Attendance at a review course is not required to take the exam, but is strongly recommended.

The Review Course is not part of the Conference and separate registration is required. The member fee for the National Review Course including the Study Guide is \$100. Download the registration form at [www.guardianship.org](http://www.guardianship.org). No state specific review courses will be offered.

#### NATIONAL CERTIFICATION REVIEW COURSE

**Saturday, October 3 / 8:30 am - 3:00 pm**

Continental breakfast available 8:00 - 9:00 am  
Lunch is on your own



*Exams are administered by the  
Center for Guardianship Certification*

The Center for Guardianship Certification (CGC) will offer the NMG and NCG exams in conjunction with the Conference.

Separate registration with CGC is required to sit for any exam and all registrants MUST sign up 30 days prior to the exam. Download exam registration and payment forms at [www.guardianshipcert.org](http://www.guardianshipcert.org). Direct exam questions to Lesley Richards, Certification Coordinator, at 717-238-4689.

#### NATIONAL MASTER GUARDIAN CERTIFICATION EXAM

**Saturday, October 3 / 9:00 am - 4:00 pm**

Continental breakfast available 8:00 - 9:00 am  
Lunch is on your own

#### NATIONAL CERTIFIED GUARDIAN EXAMS

**Saturday, October 3 / 3:30 - 6:30 pm**

Applicants may sit for the NCG exam or the TX, OR, or FL state specific certification exams during this testing period.

# SATURDAY, OCTOBER 3 - TUESDAY, OCTOBER 6, 2009

## Our Conference Schedule in Las Vegas



### SATURDAY, Oct. 3

**3:30 - 5:30 pm**  
**NGA Board of Directors Meeting**

**5:30 - 7:00 pm**  
**Welcome Reception**  
**Hosted by the NGA Premier Experts**  
*Dominion Insurance Services*  
*Prudent Investors Network*  
*SEM Applications, Inc.*



### SUNDAY, Oct. 4

**7:00 - 8:30 am**  
**Continental Breakfast**

**7:00 - 8:30 am**  
**New Member and Approved Educator**  
**Breakfasts (By Invitation)**

**9:00 - 10:00 am**  
**Life in a Constantly Changing Society**

P. Michael Murphy, DBA  
 Coroner, Clark County, Nevada



The only constant in our society is change. Our distinguished presenter will candidly discuss his ideas on how you can learn to better control your environment - both in your professional life and in your personal life.

**10:00 - 10:30 am**  
**Break / Visit with Exhibitors**  
**Silent Auction Opens**

**10:30 - 11:45 am**  
**Two Concurrent Breakout Sessions**

*Breakout Option 1*  
**Guardianship Practices, Challenges and Issues**

Vicki Alkire, CPHQ, NMG, CMC  
 President, Viable Alternatives, Inc.

Sally Hurme, JD  
 Senior Project Manager, AARP

J.R. Rittenhouse, NCG  
 Retired

Beth Upshaw Mathews, NCG  
 Program Director, Lutheran Social Service of MN

Tried everything but can't find a solution? Can't figure what to do now? Get help from your colleagues. This interactive session provides an opportunity for experienced guardians and new-comers to share problems and accomplishments. Bring your case problems and ideas.

*Breakout Option 2*  
**Effectively Training Staff in an Organization**

Lucille Lyon, MPA, NCG, CLPF  
 Division Chief, County of Los Angeles, Dept. of Mental Health, Public Guardian Division

Barbara Mitchell, LCSW  
 Older Adult Manager, County of Riverside, Dept. of Mental Health

Susan Rajlal, MPA  
 Legislative Analyst, County of Los Angeles, Dept. of Mental Health

Fiduciary agencies face a daunting task in providing work force training to ensure that staff obtains the necessary knowledge and skills to perform effective services. This presentation will introduce the concept of "Rapid on Boarding" to enhance successful training to enable your agency to replicate this model.

**Noon - 1:45 pm**  
**Awards Luncheon and Annual Meeting**

**2:00 - 3:15 pm**  
**Two Concurrent Breakout Sessions**

*Breakout Option 1*  
**Hoarding: When Stuff Takes Over a Life**

Shay Jacobson, RN, MA  
 President, Surrogate Guardian Services, Inc.

Lauren Sherman, LCSW, NCG  
 Director of Guardianship, Surrogate Guardian Services, Inc.

What is it that makes a seemingly normal, functioning individual accumulate so much stuff that it threatens their homes, their relationships and even their safety? This presentation will explore the cluttered, confusing world of the compulsive hoarder.

*Breakout Option 2*  
**Real Estate, Title, Financing and Guardianship**

Lee K. Barrett  
 President, Century 21 Barrett & Co., Inc.

Tom Courey  
 Underwriter, Ticor Title

Stuart Steingham  
 Reverse Mortgage Loan Officer

The panel will present and discuss areas of concern regarding the real estate market, financing, reverse mortgages, and title/escrow concerns focusing on issues that arise in guardianship cases.

**3:15 - 3:45 pm**  
**Break / Visit with Exhibitors**

**3:45 - 5:00 pm**  
**Two Concurrent Breakout Sessions**

*Breakout Option 1*  
**Acquired Brain Injury: Who is the Person?**

Alan Tager  
 Regional Director, Florida Institute for Neurological Rehabilitation, Inc.

Impulsivity, poor reasoning and judgment, not knowing right from wrong - is this a psychiatric or neurological condition? Learn the questions to ask.

*Breakout Option 2*  
**Tax Filings for Guardianship**

Amy L. Gallup  
 Gamett & King

A fiduciary can be held personally liable by the IRS for failing to file required tax returns or pay taxes. This session is designed to assist you in determining if you are taking basic steps to insure that you are filing appropriately with the IRS.

**5:30 - 7:30 pm**  
**Reception with Exhibitors/Live Auction**

### Find Treasure At Our Auctions

The tradition of a fund raising auction at the NGA Conference continues this year with Silent Auction bidding from 10 am - 6:30 pm on Sunday and the exciting Live Auction during the Sunday reception.

Through donated items the auction bidding raises money that is used by NGA to fund special projects that are not normally part of the budget...like support of our peers affected by Katrina. [Find a donation form at www.guardianship.org/09Conference.](http://www.guardianship.org/09Conference)

# SATURDAY, OCTOBER 3 - TUESDAY, OCTOBER 6, 2009

## Our Conference Schedule in Las Vegas



### MONDAY, Oct. 5

**7:00 - 8:30 am**  
**Continental Breakfast/  
Visit with Exhibitors**

**7:00 - 8:30 am**  
**State Affiliates Breakfast (By invitation)**

**8:30 - 10:00 am**  
**Two Concurrent Breakout Options**

*Breakout Option 1*

**Creating an Effective Working  
Relationship with Your Attorney**

Lee A. Drizin, Esq.  
President, Lee A. Drizin, Esq.

It is imperative as a guardian to have an effective working relationship with your attorney. Learn how to select the right counsel and develop a relationship that will best represent you.

*Breakout Option 2*

**Securities Fraud and Investigation /  
Banking and Elder Exploitation**

Colin Haynes  
Criminal Investigator, III, CFE, Nevada  
Secretary of State

Dorinda A. Hollenbeck  
Director of Corporate Security, VP, CCFP,  
Zions Bancorporation

Our presenters will discuss what financial institutions can/cannot do to help combat elder exploitation. They will also present an introduction to securities and investment fraud including an overview of laws governing securities registration and licensing, anti-fraud statutes and case studies of fraudulent schemes, many of which target elderly investors.

**10:00 - 10:30 am**  
**Break / Visit with Exhibitors**

**10:30 am Special Welcome**  
**Oscar Goodman, Mayor of Las Vegas**

**10:45 am - Noon Featured Presentation**  
**Legal Ramifications of Elder  
Abuse**

Catherine Cortez-Masto  
Attorney General of Nevada



Our distinguished presenter will share her expertise about the ever-increasing methods of elder

abuse. She will discuss how it is being done, who is being targeted and most importantly, some ways which you can help prevent your wards from its grasp.

**Noon - 1:00 pm**  
**Networking Luncheon**

**1:00 - 1:45 pm**  
**Dessert in The Exhibit Area**

**2:00 - 3:15 pm**  
**Two Concurrent Breakout Sessions**

*Breakout Option 1*

**The ADA, Service Dogs and Therapy  
Dogs**

Julie Arnold, Elder Law Attorney, LCSW  
Senior Citizens Law Project

Our presenter will help you to learn what the ADA says about Service Animals. She will also inform you about selection and training, and you will have the opportunity to interact with at least one animal-in-training.

*Breakout Option 2*

**Identity Theft**

Robert Sebby  
Lieutenant Financial Crimes, Las Vegas  
Metropolitan Police Department

Kim Thomas  
Las Vegas Metropolitan Police  
Department

Our presenters will discuss and demonstrate emerging new technologies and practices that criminals use to commit identity theft and fraud crimes to defraud businesses, government entities, and individuals. They will also demonstrate how the victim can be unknowingly part of the problem.

**3:15 - 3:45 pm**  
**Break**

**3:45 - 5:00 pm**  
**Two Concurrent Breakout Sessions**

*Breakout Option 1*

**Utilization of Online Auctions for  
Liquidation of Estate Property**

Rhonda Stevens  
Senior Management Analyst, Clark County  
Public Guardian's Office

David Steinke  
Personal Property Appraiser/Antique  
Dealer

Maintaining the best quality of life possible for individuals under guardianship may require liquidation of assets. Online

auction offers a worldwide marketplace of buyers thereby increasing the potential to obtain the best financial gain on sales of personal property.

*Breakout Option 2*

**SSA/Medicare and Immigration**

Robert Barlage  
Immigration Service Officer, USCIS

Pamela L. Bugbee  
Senior Immigration Officer, USCIS

Jeannie Pearce  
Director NV State Health Insurance  
Assistance Program State of  
Nevada/Division for Aging Services

Dorothy L. Tate  
Representative Payee Cadre, Social  
Security Administration

Our panel of experts will provide unbiased information to caregivers about Medicare and related health insurance benefits. They will also share information to enlighten guardians about Social Security's policies and regulations, and discuss immigration related processes as it relates to guardians.

**Open Evening**

**6:00 pm Optional "Out on the Town"**

Use this evening on your own or join friends and colleagues in a dine-around or entertainment adventure. We'll make reservations for groups at a variety of options and you can sign up at the Conference for the experience of your preference.

### Our Exhibitors

Exhibitors are expecting to create another learning opportunity for you and they will be prepared for your questions.

The Exhibit area will open with the morning break on Sunday and a highlight of the day will be the Reception with Exhibitors Sunday evening.

Monday's opportunity to visit exhibitors starts with a continental breakfast and concludes with the traditional dessert following lunch. Throughout both Sunday and Monday our breaks are in the exhibit area so you can visit with these special suppliers while you relax between sessions.

**Our Exhibitor List Updated Weekly:**  
[www.guardianship.org](http://www.guardianship.org)

**SATURDAY, OCTOBER 3 - TUESDAY, OCTOBER 6, 2009**  
**Our Conference Schedule in Las Vegas**



**TUESDAY, Oct. 6**

**8:00 - 8:30 am**

**Continental Breakfast**

**8:30 - 9:45 am**

**The Guardianship of Loyce Juanita Parker: Confused Courts, Interstate Chaos, and how UAGPPJA can Help**

Eric M. Fish, JD

Legislative Counsel, Uniform Law Commission

Terry Hammond, Esq., NCG

Executive Director, National Guardianship Association

Sally Hurme, JD

Senior Project Manager, AARP

A. L. 'Dusty' Rhodes, Esq.

Rhodes Law Office

Erica Wood

Asst. Director, ABA Commission on Law and Aging

Loyce Juanita Parker became embroiled in an interstate guardianship jurisdiction battle that resulted in final judgments appointing different guardians in Oklahoma and Texas. The panel will apply the uniform Adult Guardianship and Protective Proceedings Jurisdiction Act to determine the outcome of the case under the Uniform Act.

**9:45 - 10:00 am Break**

**10:00 - 11:30 am**

**Judges Panel**

Hon. Matthew D. Carling

Pro Tem Judge, North Las Vegas Municipal Court

Hon. Irvin G. Condon

Judge of Probate, Charleston County Probate Court

Hon. David A. Hardy

Second Judicial District Court

Hon. Kelly Patton

Magistrate, Franklin County Probate Court

These noted panelists from around the country discuss the latest guardianship and conservatorship issues.

**11:30 am - Noon Closing Presentation**

**Guardianship: An Exercise in Human Nature**

Matthew D. Carling, Esq.

Prosecutor; Pro Tem Judge; Public Defender for the City of Henderson; Trial Attorney



Guardianship requires an understanding of the basic tenants of human nature. How and why people react the way they do sheds light on how a practitioner may want to approach an intricate guardianship matter. With a firm understanding of how individuals react to authority, laws, and financial factors, a practitioner can better navigate the sometimes perilous waters of guardianship litigation and may learn a thing or two about themselves along the way.

**Noon Conference Concludes** *(Lunch is on your own)*

**Bringing the Wealth Home**

This national conference for guardians, fiduciaries and conservators concludes on Tuesday at noon, but the rewards don't end there. Everyone receives a list of all attendees and speakers with contact information so you can reconnect after the Conference to continue discussions. Each registration packet will also hold a CD that contains all the handouts and papers provided in advance by speakers. No more heavy book to cart around and your CD is cataloged to make it quick and easy to locate the mother lode when you get back to the office.



**About Continuing Education Credits**

This Conference program potentially has a total of 18.0 credit hours (Saturday 5.5 hours; Sunday 3.75 hours; Monday 5.5 hours; & Tuesday 3.25 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](mailto:education@guardianship.org) or call NGA at 877-326-5992.

**Generic Certificate of Attendance** -- For your records NGA will include a generic certificate of attendance in the Conference Packet AT NO COST. This certificate can be used to verify your attendance for recertification credits from the Center for Guardianship Certification, California Fiduciary Bureau, Texas Guardianship Certification or any other agency to which you apply on your own for recertification credits. However, if you want specific certificates of attendance for PRE-APPROVED state-specific guardianship, legal, or social work credits, or an NGA verified certificate, you will still need to pay a fee for that specific certificate. While all attendees will receive the generic certificate of attendance at no cost, fees for the specialized certificates apply based in part on the amount NGA must pay to have the sessions accredited. Fees may be paid in advance by completing the Certificate Order form found on the website and included with this brochure.

**State Specific Guardianship Credits** -- NGA will apply for guardianship credits with the Florida Public Guardianship Office and Professional Guardian Certification Board of Washington State. For a specific certificate documenting the PRE-APPROVED State Specific Guardianship credits in these states, a fee will be required.

**Continuing Legal Education Credits** -- NGA will seek approval of Conference sessions for Continuing Legal Education (CLE) credits in the NGA affiliate states of Alaska, California, Florida, Idaho, Illinois, Indiana, Kentucky, Minnesota, Missouri, Nevada, New Mexico, North Carolina, North Dakota, Ohio, Oregon, Texas, Virginia, Washington and Wisconsin. We will also apply for Legal Credits from the surrounding non-affiliate state of Utah. For a specific certificate documenting the PRE-APPROVED legal credits in these states, a fee will be required.

**Social Work Credits** -- NGA applies for social work credits with the NASW and any states that do not accept NASW certification. For a specific certificate documenting the PRE-APPROVED social work credits, a fee will be required.

**Verified Certificate** -- A verified certificate is being offered this year for those of you whom are applying for continuing education on your own and need to have your hours verified by NGA. This certificate will include all sessions attended and the possible credits for each session, it is then up to the accrediting body that you submit them to as to what is acceptable for credit.

**Issuing of Certificate** -- To issue your certificate in a timely manner, NGA must receive your Attendance Sign in Sheets (which will be enclosed in the Conference Packet) before you leave the conference. Certificates are sent via email, if provided, or U.S. mail. All certificates ordered before the conference will be issued within 45 days after the conference. Attendees are urged to check their Conference Packets upon arrival to obtain the current Continuing Education information.



National Guardianship Association  
 174 Crestview Drive  
 Bellefonte, PA 16823-8516



## 2009 National Conference on Guardianship

### Mining for Excellence - Our Schedule At-a-Glance

#### SATURDAY, October 3

7:00 am - 5:00 pm Registration Desk Open  
 8:30 am - 3:30 pm Pre-Conference Intensives  
*People With Intellectual Disabilities and Problematic Behavior*  
*NGA 2009 Legal Review*  
 8:30 am - 3:00 pm NGA Certification Review Course  
 9:00 am - 4:00 pm National Master Guardian Exam  
 3:30 pm - 6:30 pm Guardian Certification Exams  
 3:30 pm - 5:30 pm NGA Board of Directors Meeting  
 5:30 pm - 7:00 pm Conference Welcome Reception  
*Hosted by NGA's Premier Experts*

#### SUNDAY, October 4

7:00 am - 5:00 pm Registration Desk Open  
 7:00 am - 8:30 am Continental Breakfast  
 7:00 am - 8:30 am Approved Educator Breakfast  
 7:00 am - 8:30 am New Member Breakfast  
 9:00 am - 10:00 am *Life in a Constantly Changing Society*  
 Dr. P. Michael Murphy  
 10:00 am - 10:30 am Break/Visit with Exhibitors  
 10:30 am - 11:45 am Breakout Sessions  
*Guardianship Practices, Challenges & Issues*  
*Effectively Training Staff in an Organization*  
 Awards Luncheon/Annual Meeting  
 2:00 pm - 3:15 pm Breakout Sessions  
*Hoarding: When Stuff Takes Over a Life*  
*Real Estate, Title, Financing & Guardianship*  
 3:15 pm - 3:45 pm Break/Visit with Exhibitors  
 3:45 pm - 5:00 pm Breakout Sessions  
*Acquired Brain Injury: Who is the Person?*  
*Tax Filings for Guardianship*  
 5:30 pm - 7:30 pm Reception with Exhibitors and Live Auction


#### MONDAY, October 5

7:00 am - 5:00 pm Registration Desk Open  
 7:00 am - 8:30 am Continental Breakfast with Exhibitors  
 7:00 am - 8:30 am State Affiliates Breakfast  
 8:30 am - 10:00 am Breakout Sessions  
*Creating an Effective Working Relationship with Your Attorney*  
*Securities Fraud & Investigation/Banking & Elder Exploitation*  
 10:00 am - 10:30 am Break/Visit with Exhibitors  
 10:30 am - Noon *Legal Ramifications of Elder Abuse*  
 Catherine Cortez-Masto  
 Noon - 1:00 pm Lunch -- Just for Networking  
 1:00 pm - 1:45 pm Dessert with Exhibitors  
 2:00 pm - 3:15 pm Breakout Sessions  
*The ADA, Service Dogs and Therapy Dogs*  
*Identify Theft*  
 3:15 pm - 3:45 pm Break  
 3:45 pm - 5:00 pm Breakout Sessions  
*Utilization of Online Auctions*  
*SSA/Medicare and Immigration*  
 Optional "Out on the Town"  
 Open Evening

#### TUESDAY, October 6

7:00 am - 9:00 am Registration Desk Open  
 8:00 am - 8:30 am Continental Breakfast  
 8:30 am - 9:45 am *The Guardianship of Loyce Juanita Parker/How UAGPPJA Can Help*  
 Panel Presentation  
 9:45 am - 10:00 am Break  
 10:00 am - 11:30 am Judges Panel  
*Guardianship: An Exercise in Human Nature*  
 Hon. Matthew D. Carling  
 11:30 am - Noon Conference Concludes  
 Lunch is on Your Own  
 Noon

#### IMPORTANT DATES TO REMEMBER

-  **September 1** - Early Bird Registration Discount Ends
- September 8** - Hotel Room Discounts End at the Rio All Suite Hotel (*Block may fill before this date*)
- September 21** - Last Day to Receive a Refund for Cancellation of Registration



# CERTIFICATE OF ATTENDANCE ORDER FORM

## NGA Conference on Guardianship

### Las Vegas, NV

**October 3-6, 2009**

Any person needing a Certificate of Attendance for the Center for Guardianship Certification, California Fiduciary Bureau, or Texas Guardianship Certification WILL NOT need to purchase a certificate. A Generic Certificate of Attendance that you must keep to submit on your own will be provided to you in your Onsite Conference Packet.

<input checked="" type="checkbox"/>	Certificate Type	Certificate Use	Fee for Certificate
	Guardianship	Florida or Washington	\$25.00
	Legal	Specific States requesting CLE Pre-approval are, AK, CA, FL, ID, IL, IN, KY, MN, MO, NV, NM, NC, ND, OH, OR, TX, UT, VA, WI, WA	\$100.00
	Social Work	Certificate may be used for all states	\$50.00
	Verification	Certificate used for areas where NGA did not seek pre-approval	\$25.00

**Fill out Clearly and Completely Information as you would like it to appear on your Certificate**

State Requesting Certificate for: \_\_\_\_\_ License/Bar # if applicable \_\_\_\_\_

Name \_\_\_\_\_

Email \_\_\_\_\_

Company \_\_\_\_\_

Address \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_

Zip Code \_\_\_\_\_ Phone: \_\_\_\_\_ Fax \_\_\_\_\_

Total Payment for Order \$ \_\_\_\_\_

**TO MAIL FORM:** Enclose Check Or Money Order, Payable To NGA and Address To:

**NGA ♦ 174 Crestview Drive ♦ Bellefonte, PA 16823-8516**

**TO FAX FORM:** Provide Credit Card Information and Fax To

**814-355-2452**

\_\_\_\_\_ VISA      \_\_\_\_\_ MasterCard

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Name on Card \_\_\_\_\_ Signature \_\_\_\_\_