

2018 PRIME SPONSOR



WAPG 2018 Spring Conference Agenda
Monday, May 14th, 2018



- 8:15 am to 8:50 am** **Registration and Reception; Conference Committee**
Continental Breakfast
Visit Exhibits
- 8:50 am to 9:00 am** **Welcome**
Gary Beagle, WAPG President
- 9:00 am to 10:00am** **Planning for Dying: Legal, Ethical, and Clinical Perspectives** **(1.0 Ethics)**
Carla Calogero, Attorney at Law; Reed Longyear Malnati & Ahrens, PLLC
Understand the state of the law concerning the Death with Dignity Act and utilizing advance directives to stop eating and drinking. Recognize the practical challenges individuals have implementing their end-of-life wishes and develop at least two strategies to assist clients to achieve their goals. Review the attorney's role as counselor and the ethical obligations therein
- 10:00 am to 11:00 am** **A Little Help from Silicon Valley: Cheap Techie Tools to Save You Time & Money**
(1.0 General) **Claire McDonnell, COO of True Link Financial & Marcie Rogo, Head of Growth at True Link Financial**
What are the latest and greatest software tools coming out of Silicon Valley? Learn about 20+ tools and services that will help you run your practice efficiently and affordably! Discover accessible, user-friendly digital tools to streamline marketing, internal communication, expense tracking, HR, and more. Your presenters are San Francisco-based entrepreneurs who focus on running True Link efficiently, taking advantage of the best low-cost tools coming out of the Valley. True Link uses these tools to maintain best-in-class service within a quickly growing organization.
- 11:00 am to 11:30 am** **Morning Break**
Visit Exhibits
- 11:30 am to 12:30 pm** **8 Questions to Ask Your Advisor Investments Needs: Case Study (1.0 General)**
Darryl Lynch, Oppenheimer
A discussion of eight questions to ask your financial advisor that include reducing fiduciary liability, ethical objective decision making, establishing and monitoring your investment accounts. Participants will learn how to stay in compliance with their fiduciary ethics review, the eight questions to ask your financial advisor and establish and monitor their Financial Accounts.
- 12:30 pm to 1:00 pm** **Hot Lunch Buffet**
Visit Exhibits
- 1:00 pm to 1:30 pm** **WAPG Forum with Steve Lindstrom and Gary Beagle**
This interactive Discussion will concentrate on the latest Washington State legislative session and future WAPG legislative issues.



1:30 pm to 2:30 pm

A Conversation with your CPGB Representatives (1.0 Emerging Issues)

William Jabeck, Partners in Care & Dr. Penney Sanders, Compass Advocates

William Jabeck from Partners in Care and Dr. Penney Sanders from Compass Advocates serve as CPG representatives to the Certified Professional Guardian Board. Since the CPGB makes policy and regulations for all CPGs' in Washington, it will be both helpful and appropriate for WAPG members to hear from Board representatives regarding current issues related to the work of guardians.

2:30 pm to 3:30 pm

The Right of Association: Threading the Needle Between Access and Safety for Incapacitated Persons (1.0 General)

Christina Davitt, WSBA, CPG, Ogden Murphy Wallace PLLC

Guardians have been accused of restricting the incapacitated person's right to associate with others or to receive phone calls, emails, or letters. Recently enact RCW 11.92.195 places new requirements on guardians with regards to safeguarding the incapacitated person's right to associate. Learn what new duties are required of guardians and get guidance on making decisions about whether the incapacitated person's right to associate should be restricted, and if so- how, and what to do next?

3:30 pm to 3:45 pm

Afternoon Break

Exhibit Raffle

3:45 pm to 4:45 pm

Remaining Inspired for the Duration (1.0 General)

Key Note Speaker: Dr. Kurt A. Risley

Sharing tools I use for myself and staff to maintain motivation in difficult situations. The We Create Peace story

Processes + good information = peace in the storm

4 processes to consider

Decision making

Daily care plan

Financial budget and responsibility

Communication with stakeholders

How to succeed

The key to success, don't give up

Follow your processes and improve them.

Educate yourself and Take a break

4:45 pm to 4:50 pm

Closing Remarks

Credits: CPG 6.00 total credits applied

4 General, 1 Emerging Issues: Communication, 1 Ethics

CGC, NGA, WSBA

Free Parking Validations

Free Wi-Fi