

2018 PRIME SPONSOR



WAPG 2018 Fall Conference Agenda
Monday, October 8th, 2018



8:15 am to 8:50 am	Registration and Reception; Conference Committee <i>Continental Breakfast</i> <i>Visit Exhibits</i>
8:50 am to 9:00 am	Welcome Gary Beagle, WAPG President
9:00 am to 10:00am	The Bonding Process (1.0 General) Kimberly Edgar, The Bar Plan <ul style="list-style-type: none">✓ What the Underwriter looks for when underwriting a Guardianship Bond✓ Parameters for Restricting Assets✓ How the Bonding Company monitors assets✓ Restriction of the Assets and Reduction of the Bond Amount may lower bond premiums
10:00 am to 11:00 am	The Zen of Ethics A Guardians Perspective in Modern Times (1.0 Ethics) Gary Beagle, Beagle and Associates, CPG <p>This session will discuss the National Guardians Associations (NGA) Model Code of Ethics utilized as a basis for a Guardians Standards of Practice.</p>
11:00 am to 11:30 am	Morning Break <i>Visit Exhibits</i>
11:30 am to 12:30 pm	Preparing Your Practice for Sale – and Selling it! (1.0 General) Justin D. Farmer, Attorney at Law, CBI Michael Letts, Morgan Stanley <p>The presentation serves as a guide for Certified Professional Guardians looking to create and implement their succession plan. Justin will open on the selling process and how he leverages your practice. Michael will discuss his client portfolio review process and how it adds value to Justin’s service and your practice. The presentation will close with a Q&A period.</p>
12:30 pm to 1:00 pm	Hot Lunch Buffet <i>Visit Exhibits</i>
1:00 pm to 1:30 pm	WAPG Forum with Steve Lindstrom and Gary Beagle <i>Visit Exhibits</i>

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1:30 pm to 2:30 pm

Reverse Mortgages for Guardians: Another Tool for your Toolbelt

(1.0 General) Phillip E. Miller, J.D., Reverse Mortgage Specialist

This Presentation is designed to explain to Guardians how the Reverse Mortgage process works, and to give practical examples of how it can be utilized to benefit their clients. Exhaustion of available assets is a serious and common issue, and this presentation will demonstrate how a Reverse Mortgage can be used to address it in a very positive way.

2:30 pm to 3:30 pm

CPG Communication: An Effective Tool for Your Clients and Practice.

(1.0 Communication)

Gary Beagle, Beagle and Associates, CPG

Malinda Frey, Clarity Guardians, CPG

Karen Klem Newland, CPG

This session will discuss the communication tools that are necessary for a CPG to develop effective interactions with other professionals. Specific emphasis will be placed on effective communication with courts, attorneys, government agencies and others to advocate for clients and their practice.

3:30 pm to 3:45 pm

Afternoon Break

Exhibit Raffle

3:45 pm to 4:45 pm

Embracing Adversity and Changing the Way We Think About Limitations (1.0 General) Key Note Speaker: Gabrielle D. Richards,

Life is precious and unpredictable – everything does not always go according to plan. Learning to embrace adversity – rather than trying to overcome it – might make the difference between a life of fulfillment and a life with a never-ending series of frustrations. The speaker will take the audience with her on her own journey through adversity – starting with a car accident at age 18 that left her paralyzed but unbroken.

4:45 pm to 4:50 pm

Closing Remarks

Credits: CPG 6.00 total credits applied- pending approval

4 General, 1 Emerging Issues: Communication, 1 Ethics AOC CGC

Free Parking Validations

Free Wi-Fi