



WAPG 2022 Spring Virtual Conference Agenda

Tuesday, May 17, 2022

7:50 am – 8:00 am

Welcome

Mark Vohr, J.D., CPG Principal, Ohana Fiduciary Corp, WAPG Current President

8:00 am – 9:00 am

Michael Longyear, Reed Longyear Malnati Corwin & Burnett, PLLC

Miriam Ayoub, Graunke Ayoub Law

Uniform Guardianship, Conservatorship, and other Protective Arrangements Act (“UGA”)

- An overview of the newly enacted UGA
- Discussion of Major Reforms, Impact on CPGs, and Summary of Guardianship/Conservatorship Process Under the UGA

9:00 am – 10:00 am

Mark Vohr, J.D., CPG Principal, Ohana Fiduciary Corp

Overview of the Washington Courts Revised Guardianship/Conservator Forms for the Uniform Guardianship and Conservatorship and Other Protective Arrangements Act

- Theory applied by the Forms Committee behind drafting of the Forms
- Status of Revisions and Updates to the Forms
- County By County Requirements for Using the Forms
- Tips and Examples for Incorporating the Forms into Your Guardianship/Conservatorship Practice

10:00 am – 11:00 am

Jeremy Lau, Prudent Investors

Kerri A. Lloyd, Prudent Investors

Fiduciary Objectives of Working with a Financial Advisor

- Explain the importance of Character, Competency and Standard of Care as related to working with a Financial
- Outline key elements to consider when interviewing a Financial Advisor RISK
- Discuss the Uniform Prudent Investor Act, its impact on the Advisor/Fiduciary relationship and how to maintain ongoing compliance with UPIA
- Define components of comprehensive financial planning for the Special Needs consumer

11:00 am – 11:15 am

Morning Break – Platinum Sponsor Presentation

✓ Darryl Lynch, *Oppenheimer & Co. Inc.*

11:15 am – 12:15 pm

Deborah Jameson, Neil & Neil, P.S.

Standards of Practice

- Overview of re-write of SOPs
- Changes to SOPs
 - ✓ Global changes
 - ✓ Specific changes
- SOPs resulting in most grievances
- Delegation

12:15 pm – 12:45 pm

Lunch Break - Silver Sponsor Presentations

- ✓ NWSIS
- ✓ Aegis Living
- ✓ Purple Cross
- ✓ LS Realty Group
- ✓ Family Resource Home Care

12:45 pm – 1:45 pm

Nicole Kane, Aging Wisdom

Person Centered Care Planning & Residential Placement Considerations

- Review the most common reasons that trigger a need for placement
- Understand the ethical duties and responsibilities of a professional guardian in making a placement decision
- Have a working knowledge of placement options/levels of care and considerations of each
- Consider potential ethical dilemmas in balancing client preferences with their care and safety needs
- Anticipating possible pitfalls/reasons a placement can fail
- Knowing community and professional resources to obtain an independent assessment and care recommendations

1:45 pm – 2:45 pm

Anthony Palmieri, Palm Beach Clerk

NGA's President: Committed to Good, Ethical & Benevolent Guardianship

- #Guardianship Data Transparency: we need to collect data so we can empirically quantify all of the vital public services that guardianship provide to those needing protection, policymakers should make data-driven decisions & not knee-jerk reactions based on anecdotal "stories".
- #Silver Collar Crimes: the number #1 pipeline into guardianship is exploitation by family members and others in close proximity to their loved ones, often guardians and the courts have to rescue these victims, then sometimes the perpetrators are the very same people who hinder guardianship services.
- #Public Guardian Funding: Public policy should match state appropriations, guardians should not be forced into pro-bono appointments, we need more funding for public guardianship, and professional guardian should be well and fairly compensated.
- #Certified Guardianship Investigator: the NGA is developing specialized training and education for guardianship auditors, investigators, reviewers, monitors, law enforcement officers, prosecutors, APIs, etc., we will teach these investigators empathy for good, ethical, and benevolent guardianship.

2:45 pm – 3:00 pm

Q&A Panel – Discussion all Speakers

Credits: 6.0 total credits

3.0 General, 2.0 Emerging Issues, 1 Ethics

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