

The Guardian Institute

Administered by
Bridge Builders, Ltd.

Public Charity 501(c)3

March 2017
Volume 4, Issue 2



Last Call to Register for the 14th Annual CPG CE Conference— Bremerton! Prices go up March 19th!

OUR SPONSORS FOR THIS BREMERTON CONFERENCE ARE:



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Darryl J. Lynch
Executive Director—Investments of Oppenheimer & Co., Inc.

2017 GOALS FOR THE GUARDIAN INSTITUTE

- ◆ Develop a website that will include a search for guardians as well as a search function for tips on how to navigate our complex long-term care system. If you would like to contribute to this and get credit on our website, please contact us at info@bridgebldrs.com.
- ◆ Develop our first Volunteer Guardian Advocate Program in Clallam County. This is an effort to address the need for volunteers for clients who are typically *Pro Bono*, not having enough income to pay a professional guardian. The Guardian Institute has developed a way to add enhancements that will make the current laws and rules regarding guardianship more user-friendly for volunteers. **Anyone who is interested in developing this program in their county, please contact us at info@bridgebldrs.com.**

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The Guardian Institute
Administered by
Bridge Builders, Ltd.
Mindi R. Blanchard, President
PO Box 610
212 Center Park Way
Sequim, WA 98382
info@bridgebldrs.com
(360) 683-8334

ASSISTANCE RECIPIENTS

Client A0002—Clallam County Mini-grant amount awarded: \$2,000 Amount Expended: \$636.35

[Update] Client A0002 was mentioned in the October 2016 newsletter who was desperately in need of alternative housing. Our “system” has repeatedly failed this client. The guardian has gotten the client’s medication adjusted and had the client re-assessed, more than doubling caregiver hours. The client reports much relief after the roommate was moved out and feeling much better with the new medication adjustment. The client had funds to cover his rent and utilities for February but will need assistance in March. The guardian has applied to a local service agency for rent assistance. The Guardian has discovered that the Rep Payee had not been paying the utilities in an equitable manner, having the client pay more than the roommate, causing the client additional financial hardship. The guardian has taken over the client’s financials and is taking steps to correct to correct the inequity. The client is now at the top of the list for low income housing so the guardian hopes that it will not be long before getting him settled.

Client A0003—Clallam County Short-term Low interest loan awarded: \$3,000.00

Client A0003 is on Medicaid and has a house, full of furniture and other items that have no resale value, that needs to be sold. The Guardian has found a contractor willing to empty the house for \$1,200.00. The realtor that will be the real estate listing agent has agreed to arrange for the electricity to be turned back on so that the client doesn’t have to pay a deposit. With some of the residual funds, the guardian plans to pay for the house to be cleaned on the inside. The amount used of the approved amount will be re-paid to the Guardian Institute at the closing of the house sale so that these funds will be available to other Guardians for this purpose.

**If you are interested in donating to support these clients, please send a check to:
Guardian Institute
PO Box 610
Sequim, WA 98382**

See the donation form in this newsletter.

CRISIS STABILIZATION (KING COUNTY)

One of the goals of the Guardian Institute is to provide resources to lay and professional guardians.

A mental health agency in King County has offered a free consultation for any guardianship client in King County referred through the Guardian Institute. Any lay or Certified Professional Guardian interested in this service can contact the Guardian Institute through Bridge Builders, Ltd by calling (360) 683-8334 or emailing info@bridgebldrs.com. The Guardian Institute will arrange to connect you with the agency.

UPDATE ON JANE FROM THE DECEMBER 2016 STORY

We first brought you the story of Jane in our March 2016 newsletter. She had been financially exploited and isolated by “friends” she trusted until a caregiver called Adult Protective Services. The guardian improved Jane’s life at the apartment where she was living but Jane wanted to move into her caregiver’s home. The court allowed the caregiver to become Guardian of the Person and the original guardian continued at Guardian of the Estate. In December, we talked about how much she enjoyed being surrounded by her caregiver and her caregiver’s mother in a house in the woods where she could lay in bed and see the wildlife. A concern the guardian had was that because Jane lived “off the grid” all her life and did not even have Social Security, the guardian would have to apply for SSI and Medicaid when Jane’s funds ran out.

Well, Jane died February 14, 2017, at the home where she stayed. The guardian had completed an SSI application only a couple weeks earlier. Even though no one talked with Jane about finances, she seemed to know when it was time to leave. Toward the end, her caregiver reported that Jane would sleep so much that the caregiver would wake her up just to make sure she was alive. The last time the caregiver woke her up, Jane said, “Quit waking me up! I was almost there.”

Jane was a very courageous woman who insisted on living life by her own terms to the very end.

NEWS WANTED!

The Guardian Institute wants your news. Please submit items of interest such as:

- Attend a CPG Board meeting (teleconference or in-person) and submit your notes to this newsletter.
- Press releases about your business or an individual accomplishment.
- Success stories of guardianships that improved clients’ lives.
- Articles regarding guardianship issues.
- As a question and the newsletter will print it for feedback.
- Write about problems that guardians face.
- Share business tips and ways to save time.

THE BUSINESS OF GUARDIANSHIP, PART V

Business by the Numbers

*By Mindi R. Blanchard, M.Ed., CPG
President, Bridge Builders, Ltd.*

NUMBERS... I have had a struggle learning how to track the business “numbers” for Bridge Builders, Ltd in a meaningful way. I’m not talking about bookkeeping. I’m a disaster at bookkeeping. That’s why I have always had an in-house bookkeeper. I’m talking about tracking how the business is doing in a global sense. I was fortunate that my first bookkeeper kept “holding-my-feet-to-the-fire” and did not let me develop that attitude that I have seen in other businesses where the owner thinks that the responsibility for the business’ success is entirely on the shoulders of whoever is handling the business “books.”

As business owners, we must always keep in mind that the only person as interested in your business is... the

Continued on page 4

business owner. Employees can be extremely loyal and go the extra mile but at the end of the day, they are looking for a paycheck; and if that paycheck isn't forthcoming, they will be looking for a different employer no matter how sad they might be at the prospect of leaving. A business owner is someone who has "given birth" to a business and works extremely hard to nurture and grow that business, much like raising a child. A business owner has a lot of emotional, as well as financial, investment in the business; and when money is tight, the business owner gets paid last, or not at all. So, I am going to share what, for me, are the important numbers in my business.

Billable vs. Non-Billable time: Every business has tasks that are considered part of the business overhead and cannot be billed to the client. It is important to make sure that the non-billable time doesn't get out of hand. That doesn't mean standing over your employees with a sledgehammer. I've been fortunate to have employees who have been with the business for some time, so I look at are they getting tasks completed within a reasonable length of time and if not, we discuss the issue as a problem-to-find-a-solution-for instead of what the employee might be doing wrong. As I've mentioned before, everyone in my office documents their time on an Excel spreadsheet. When I have a new employee, I have them document billable and non-billable time for a while so that I can see what they are doing (new employees have additional non-billable time just because of the learning curve) and help them learn which is which. I total billable time weekly and have a separate spreadsheet where I document the totals in hours and the monetary totals. This is not exact but it helps me know how we are doing on a weekly basis and allows me to plan if we are having a slow month. I also have another spreadsheet with monthly totals back to 2008, when I started doing this. It is helpful to be able to see trends over time or, if a month is slow, to be able to look back and see what happened during the same month in the previous year. It gives more perspective.

Profit & Loss statement: We use QuickBooks Pro and I love the feature called "Previous Year Comparison." This feature shows me how the business is doing compared to the previous year in gross income and in net income. I don't look at this as our actual income because we always have outstanding receivables but it gives me a general idea of how we are doing compared to the previous year.

Gross income vs. Actual income: I keep another Excel spreadsheet that has a list of all our clients. I then have a column where I enter the amount billed as I go through the monthly invoices (yes, I review them each month). Then I enter in the next column what I expect we will actually receive from each client. Sometimes we must wait to get paid until, say, a property sells, and sometimes I know that we will never capture those billable hours. Totaling the actual income tells me the amount the business has to work with for the month. The point is that the business owner must be aware of these numbers in order to make financial adjustments when necessary. If a business owner has too many low income or pro bono clients, the business could end up in financial jeopardy.

Balance Sheet: For me, a balance sheet is somewhat of an enigma. I couldn't develop a balance sheet if my life depended on it. But, it provides very useful numbers. Again, I love the "Previous Year Comparison" feature in QuickBooks Pro but, aside from that, a balance sheet tells the business owner about the financial health of the business. It shows actual income and it also shows where the business is at financially with its liabilities.

While business revenue ebbs and flows throughout the months and years, if the business is not generally growing, it is headed for a slow, or fast, and always painful demise. A savvy business owner needs to be aware of the trends and adjust business practices accordingly. There is no "status quo" in business; it is either moving forward or moving backward.

I don't spend a lot of time with this. On a weekly basis, it might take me 10-15 minutes. Monthly, it will take some additional time. But if a business owner doesn't learn how to track the numbers in a meaningful way, the business could be suffering and the business owner wouldn't be aware of it until it's too late.



CONTINUING EDUCATION

14th Annual CPG CE Conference Bremerton

Tuesday & Wednesday, March 28th & 29, 2017

Venue: Kitsap Conference Center Harborside, Bremerton

WAPG 2017 Spring Conference

Monday, May 15, 2017

SeaTac Convention Center, SeaTac

4th Annual CPG CE Conference—Spokane

September 12 & 13, 2017

NEW VENUE! Red Lion River Inn, Spokane

*** Refer a potential speaker (\$30.00 discount on your registration per credit hour)

***Be a CPG speaker (\$100.00 discount on your registration per credit hour)

***Recruiting and organizing vendors. The time will be deducted from your registration fees.

2017 NGA National Conference on Guardianship

October 14-17, 2017

Venue: Cheyenne Mountain Resort, Colorado Springs, Colorado

***If you have a continuing education event you wish to add, please email
info@bridgebldrs.com***

The Guardian Institute

(Administered by Bridge Builders, Ltd)

14th Annual Certified Professional Guardian Continuing Education Conference

Kitsap Conference Center at Bremerton Harborside
Tuesday & Wednesday, March 28 & 29, 2017

Registration fee: \$400.00. This includes a hot breakfast and lunch each day. Payment must be received **on or before March 19, 2017**. Starting March 20, 2016, the registration fee increases to \$500.00.

Individual sessions are \$40.00 for each credit hour. **Fax to: (360) 683-8358.** ***Partial Scholarships available: Email info@bridgebldrs.com for an application.

Name: _____

Address: _____

City: _____ State: _____

Zip: _____ Phone: _____

Email: _____

CPG# _____

Please check one:

_____ Binder/Coursebook (additional \$15.00)

_____ USB Memory Stick

Questions? Email info@bridgebldrs.com

_____ Full 2-day conference \$400

_____ Individual sessions \$40 *(please write the sessions chosen on a separate page)*

_____ March 29th ONLY \$200 (must be the full day)

Check _____ Please make your check payable to **The Guardian Institute** Address: PO Box 610, Sequim, WA 98382

Credit Card Visa Mastercard Amount: _____

CC# _____ Security code: _____ Exp. Date: ____/____

Name on Credit Card: _____

Signature: _____

Parking and Accommodations: Parking is \$7.00 per day

The Hampton Inn & Suites (360) 405-0200 has a conference rate of \$109.00 per night. Reservations are under The Guardian Institute Bridge Builders or group code GIT. **Reservations must be made by 03/13/2017** to receive this rate.

Payment Policy: Individual registrants must use a separate registration form, however; payment for multiple parties may be made with a single check or credit card. Registration fees will be refunded (less \$50.00 for handling) for written cancellations postmarked or faxed to us by 5:00 PM Wednesday, March 19, 2017.

Contact us if you do not receive a written or email registration confirmation!

Thank You to all our 2017 Contributors!

Premier Sponsors



John Zalevitis, Financial Advisor
jzalevitis46774@wradvisors.com
www.johnzalevitis.wrfa.com



Darryl J. Lynch, Executive Director—Investments of
Oppenheimer & Co. Inc.

Vendors

Comfort Keepers, Carrie Mulcahy, GM
Concerto Health, Scott Person, Renton
Exact GPS, Charlene Hamblin, Puyallup
Purple Cross, Dave Martin, Tacoma

In-Kind Donations

Bridge Builders, Ltd, Clallam County
Platt Irwin law Firm, Clallam County
John Zalevitis, Waddell & Reed Financial Advisors

Attendees-to-date — Bremerton

- Dewey Abbott, CPG, Port Orchard
- Karen Abbott, CPG, Port Orchard
- Kevin Ahl, CPG, Port Orchard
- John Anderson, CPG, Bothell
- Margaret Anderson, CPG, Bothell
- Robin Balsam, attorney, CPG, Tacoma
- Katlyn Balsam, CPG, Tacoma
- Gary Beagle, CPG, Vancouver
- Mindi Blanchard, M.Ed., CPG, Sequim
- Theresa Boyle, CPG, Gig Harbor
- Clare KC Brown, CPG, Maple Valley
- Ingrid Cameron, CPG, Gig Harbor
- Brenda Carpenter, CPG, Sequim
- April Coberly, CPG, Gig Harbor
- Leslie Cook, CPG, Bellingham
- Winston Cook, CPG, Medical Lake
- Linda Custer, CPG, Puyallup
- Susan Dougherty-Guild, CPG, Bellevue
- Karla Edwards, CPG, Des Moines
- T.L. Nicole Emanuel, Pending, Spanaway
- Renee Ewalt, Attorney, GAL, CPG
- Michelle Ewert, CPG, Bellevue
- Anita Farr, CPG, Colfax
- Meghn Glass, CPG, Spokane
- Geniece Gregory, CPG, Sammamish
- Michael Gross, Ph.D., CPG, Kent
- Charlene Hamblin, CPG, Puyallup
- Cynthia Hanning, CPG, Edmonds

Conference Speakers— Bremerton

- Robin Balsam, Balsam Law
- Andi Berg, DSHS Social Work Supervisor
- Mindi R. Blanchard, M.Ed., CPG, Guardian Institute
- Brenda Carpenter, CPG, Bridge Builders, Ltd.
- Lin O'Dell, Attorney, CPG, GAL
- Giselle Dew, DSHS Financial Supervisor
- Seth Dickey, Asst. Attorney General
- Michelle Graham, Graham & Graham
- Ian Horlor, Financial Subject Matter Expert, DSHS
- Tony Jones, realtor, Northwest Home Sales
- Darryl Lynch, Executive Director—Investments, Oppenheimer & Co.
- Jenny Nickl, CPG
- Sister Sharon Parks, WA State Catholic Conference
- Gabrielle Richards, Martin & Richards, LLP
- Jim Thomas, WA State Catholic Conference

Attendees, Con't

- Stephanie Inslee, CPG, Bellingham
- Melissa Johnson, CPG, Puyallup
- Johnson, Tracy, Pending, Puyallup
- Elaine Judd, CPG, Humptulips
- Richard King, CPG, University Place
- Iris Kingston, CPG, Bellingham
- Deborah Lawrence, CPG, Puyallup
- Mack Lievense, Attorney, CPG, Gig Harbor
- Susan Mattern, CPG, Tacoma
- Cindy Maxwell, CPG, Bellingham
- Lorelee McDonald-Williams, CPG, Spanaway
- Chris Medley, Pending, Tacoma
- Jenifer Mick, CPG, Seabeck
- Peggy Mosshart, CPG, Union Gap
- Kirsten Murray, CPG, Poulsbo
- Linda Navage, CPG, Bainbridge Island
- Andrew Neil, Attorney, CPG, Tacoma
- Chris Neil, Attorney, CPG, Tacoma
- Gerald Neil, Attorney, CPG, Tacoma
- Virginia Nickl, CPG, Tumwater
- Lin O'Dell, Attorney, GAL, CPG, Spokane
- Diane Pearson, CPG, Poulsbo
- Beth Peoples, CPG, Federal Way
- Marci Perkins, CPG, Waitsburg
- Susan Pritchard, CPG, Poulsbo
- Frank Puschak, CPG, Spokane
- Tracy Raymond, CPG, Sumner
- Janene Robinson, CPG, Graham

Volunteer Hours for 2017: 20

Partial CPG Scholarships awarded: 5

Attendees, Con't

- Laura Schmidt, CPG, Tacoma
- Michael Schmidt, CPG, Tacoma
- Sari Spieler, CPG, Freeland
- Elizabeth Stone, CPG, Tacoma
- Stephen Trefts, CPG, Spokane
- Jodi Wallace, CPG, Bellingham
- Vicki Williams, CPG, Vancouver
- Sean Williams, CPG, Vancouver
- Albert "Doc" Williams, CPG, Spanaway
- Paula Wind, CPG, Chehalis
- Amber Zabel, CPG, Vancouver
- Nicholas Zaharevich, CPG, Waitsburg
- Armelia Zaharevich, CPG, Waitsburg

The Guardian Institute

Donation Form

Name _____

Address _____

Phone: _____ Email _____

I would like my donation to go toward the following:

- | | |
|--|---|
| <input type="checkbox"/> General Fund | <input type="checkbox"/> Educational programs for guardians |
| <input type="checkbox"/> Client ID# _____ | <input type="checkbox"/> Scholarship fund for guardians |
| <input type="checkbox"/> Web Site | <input type="checkbox"/> Other _____ |
| <input type="checkbox"/> Legal Fees associated with guardianship | _____ |
| <input type="checkbox"/> Needs of low income clients not covered by Medicaid | |

Check Please make your check payable to **The Guardian Institute** Address: PO Box 610, Sequim, WA 98382

Credit Card: Visa Mastercard Amount: _____

CC# _____ Security code: _____ Exp. Date: ____/____

Name on Credit Card: _____

Signature: _____

Billing address: _____

Send to: Guardian Institute, PO Box 610, Sequim, WA 98382

Fax: (360) 683-8334

Scan & Email: indo@bridgebldrs.com

Questions? Call (360) 683-8334

The Guardian Institute

Ways to Help

Cash Donations: Can be designated many ways

- Specific personal needs
- Specific guardianship client
- Specific county
 - ~Funds to pay a professional guardian to take a challenging pro bono client
 - ~Funds to pay for legal fees associated with guardianship
- Transportation needs
- Unusual housing needs
- Unique care needs

In-kind donations

- Legal services
- Medical services
 - General; Eye exams; Glasses; Hearing exams ; Hearing aides
- Dental services
- Denture services
- Legal services for guardianships
- Be a volunteer guardian

Sponsor Opportunities

- Guardian Certification Program
 - ~Sponsor for rural counties
 - ~Provide hotel accommodations
- Continuing education conferences
 - ~Sponsor one or more breakfasts
 - ~Sponsor one or more lunches
 - ~Sponsor one or more snacks
 - ~Sponsor a guardian
 - ~Provide hotel accommodations
- Web site development & maintenance
- Lay guardian support groups
- Volunteer guardianship program
 - ~Development
 - ~Training
 - ~Support meetings

100% of donations go to improving the lives of vulnerable adults under guardianship

Interested?

Call

360-683-8334

Or Email

info@bridgebldrs.com

Join AmazonSmile and list the Guardian Institute as your charity of choice and the Guardian Institute will receive 0.5% of the price of your AmazonSmile purchases.

We accept VISA and MasterCard
Please send checks to the
Guardian Institute, PO Box 610, Sequim, WA 98382

The Guardian Institute is now approved for the Washington State Combined Fund Drive

**Bridge Builders, Ltd is currently the Administrator of the Guardian Institute.
Mindi R. Blanchard, M.Ed., CPG,
President**

Complimentary Guardian Profile

Please complete and email to info@bridgebldrs.com or fax to
(360) 683-8358

General Information:

Name: _____

Business Name: _____

_____ Solo Practice _____ Agency _____ Other: _____

How you would prefer to be contacted:

Email: _____

Phone: _____

Other: _____

How long have you been in business? _____

In what county do you reside? _____

What counties do you serve? _____

Services Provided:

_____ Guardianship _____ Power of Attorney _____ Representative of the Estate

_____ Fiduciary (includes basic bill paying) _____ Care Management

Other: _____

Accept: _____ Private Pay _____ Medicaid _____ Pro Bono _____ Public Guardian

Specialty Area(s):

Have we missed anything? _____

Washington State Certified Professional Guardian Profiles by County

(The Guardian Institute does not endorse any profiles. This is for marketing purposes only)

Clallam

Business Name: Bridge Builders, Ltd

CPGs: Mindi R. Blanchard, M.Ed.
Brenda Carpenter

Business Type: Guardian Agency

Years in Business: 13

Counties Served: Clallam, Jefferson, North Kitsap

Services Provided:

- Guardianship
- Care Management
- Power of Attorney
- Representative of the Estate
- Fiduciary
- Trustee
- Local Emergency Contact (Peace of Mind Program)
- Consulting/education

Payment:

- Private Pay
- Medicaid
- Public Guardian

Specialties: Crisis management; challenging behaviors; education; program development. NGA member.

Contact: (360) 683-8334

Email: info@bridgebldrs.com

Website: www.bridgebldrs.com

(See also: Caring Choices—Jefferson County)

Jefferson

Business Name: Caring Choices

CPG: Elaine Morgan

Business Type: Solo Practice

Years in Business: 5 years

Counties Served: Jefferson, Kitsap, Clallam

Services Provided:

- Guardianship
- Power of Attorney
- Representative of Estate
- Fiduciary
- Care Management

Payment:

- Private Pay
- Medicaid

Specialties: Strong healthcare background; strong advocacy skills in healthcare needs and senior needs; specialize in working with seniors.

Contact: (360) 551-1476

Email: emwelcom@msn.com

Website:

www.caringchoicesguardianshipservices.com

Business Name: Caring Choice—KPT and Associates

CPG: Kathleen Traci

Business Type: Solo Practice

Years in Business: 4 years

Counties Served: Jefferson, Kitsap, Clallam

Services Provided:

- Guardianship
- Power of Attorney
- Representative of the Estate
- Fiduciary
- Care Management

Payment:

- Private Pay
- Medicaid

King

Business Name: Allegiance Professional Guardians, Inc.

CPGs: Rebecca Bailey, LICSW, CPG and Debra Howard, MSN, CPG

Business Type: Agency

Years in Business: 1-year

Counties Served: King, Pierce, North Thurston

Services Provided:

- Guardianship
- Care Management
- Power of Attorney
- Representative of the Estate
- Fiduciary
- Clinical Consultation for Individuals & Organizations.

Payment:

- Private Pay
- Medicaid
- Specialties: General Practice, Adults. Rebecca has 30-years Licensed Social Work experience. Debra is a psychiatric nurse specialist with 30-years experience.

Contact: (253) 520-1800

Email: rebecca@allproguardians.com or debra@allproguardians.com

Business Name: Whole Heart Guardianship

CPG: Clark "Erik" Eggertson

Business Type: Solo Practice

Years in Business: 7

Counties Served: Snohomish, King

Services Provided:

- Guardianship
- Care Management
- Power of Attorney
- Representative of the Estate
- Fiduciary
- Trustee

Payment:

- Private Pay
- Medicaid

Contact: wholeheart@comcast.net

Specialty Areas: Accounting; Extensive knowledge on housing options; Medically needy.

Business Name: Bridge Disability Ministries Guardianship Agency

CPGs: Patty Croteau

Gordon Ellison-Oslin
Suzy Dougherty-Guild
Michelle Ewert

Business Type: Guardian Agency

Years in Business: 25

Counties Served: King & Snohomish

Services Provided:

- Guardian of Person
- Guardian of Estate
- Standby Guardian
- Care Management
- Individual Case Management contracts
- Fiduciary

Payment:

- Private Pay

Specialties: IP's with Intellectual Disabilities and Developmental Disabilities.

Contact: (425) 885-1006 ext. 102

Email: patty@bridgemin.org

Website: www.bridgemin.org

We do not serve IPs with only age-related dementia.

See also: Richard King—S. King (Pierce

Kitsap

CPGs: Dewey Abbott

Business Type: Solo Practice

Years in Business: 13 years

Counties Served: Kitsap, Mason

Services Provided:

- Guardianship
- Power of Attorney
- Representative of the Estate
- Fiduciary

Payment:

- Private Pay
- Medicaid
- Possibly Pro Bono

Specialties: Retired military, worked for VA and am a life member of Disabled Veteran's of America; 16 years of military services no NJR, honorably discharged. Carry Error & Omissions Insurance

Contact: (360) 871-1629

Cell: (360) 731-3294

Email: dkayabbott@wavecable.com

Kitsap

Business Name: Elder Solutions, LLC

CPG: Linda Navage

Business Type: Solo Practice

Years in Business: Since 2004

Counties Served: Kitsap

Services Provided:

- Guardianship
- Power of Attorney
- Rep of the Estate
- Fiduciary
- Trustee

Payment:

- Private Pay
- Medicaid

NGA member since 2010.

Contact: eldersolutions@msn.com

Business Name: Hoehnen Guardianship Foundation

CPG: Sue Pritchard

Business Type: Agency

Years in Business: Since 1993

Counties served: Kitsap

Services Provided:

- Guardianship
- Stand-by Guardian
- Rep of the Estate
- Fiduciary
- Trustee
- Special Needs Trust Account

Business Name: Structured Harmony

CPG: Jenifer Mick

Business Type: Solo Practice

Years in Business: 6 years

Counties served: Kitsap

Services Provided:

- Guardianship
- Care Management
- Power of Attorney
- Rep of the Estate
- Fiduciary
- Trustee
- Professional organization
- Parental supervision

Payment:

- Private Pay
- Medicaid
- Pro Bono

Specialties: Over 20years in social work and law enforcement; Army veteran; trained in borderline personality disorder treatment; dual diagnoses (substance and mental health); taught parent classes and was a foster parent. Experience as domestic violence advocate. Has worked with hoarding situations. Great at bringing order to chaos and running estate and garage sales.

Contact: (360) 710-9122

Email: structuredharmony@yahoo.com

See also; Allegiance Professional Guardians, Inc. (King)

Pierce

Business Name: Commencement Bay Guardianship Services

CPGs: Robin Balsam

Heather Crawford

Katlyn Balsam

Business Type: Agency

Years in Business: Since 1993

Counties Served: Pierce, Thurston, Kitsap, S. King

Services Provided:

- Guardianship
- Care Management
- Power of Attorney
- Rep of the Estate
- Fiduciary
- Trust Administration
- Representative Payee

Payment:

- Private Pay
- Medicaid

Specialties: Affiliated with Robin H. Balsam P.S., an elder law firm with two attorneys who also serve as guardians.

Contact: (253) 627-7605

Web Site: www.cbguardian.com

Business Name: KR Guardianship Services

CPG: Richard King

Business Type: Solo Practice

Years in Business: 11

Counties served: Pierce, Kitsap, South King

Services Provided:

- Guardianship
- Power of Attorney
- Fiduciary
- Care Management

Payment:

- Medicaid

Specialties: Veteran; Developmental Disability; Rehabilitation counselor background (M.A.); Special ed, voc rehab counseling.

Contact: (253) 565-8065

Email: krsrvs-richk@juno.com

Business Name: Sunrise Guardianship Services

Business Type: Guardian Agency

Years in Business: Since 1999

Counties Served: Pierce, Thurston, Kitsap

Services Provided:

- Guardianship
- Power of Attorney
- Rep of the Estate
- Fiduciary

Payment:

- Private Pay
- Medicaid
- Pro Bono

Snohomish

Business Name: Miller Family Fiduciary, LLC

CPG: Ben Miller, CPG

Business Type: Solo Practice

Years in Business: Since August 2015

Counties Served: King, Snohomish, Kitsap and Island

Services Provided:

- Guardianship
- Power of Attorney
- Rep of the Estate
- Fiduciary
- Care Management

Payment:

- Private Pay

Specialties: Management services for care, property, and financial affairs.

Contact: (425) 670-8060

Email: ben@millerfamilyfiduciary.com

Website: www.millerfamilyfiduciary.com

Spokane

Business Name: Paladin Services

CPG: Kristi Kilbourne

Business Type: Solo Practice

Years in Business: 2.5 years

Counties Served: Spokane, Stevens Pend Orielle

Services Provided:

- Guardianship
- Power of Attorney
- Rep of Estate
- Fiduciary

Payment:

- Private Pay
- Medicaid

Contact: (509) 863-5598

Email: kilbournecpg@gmail.com

CPG: Terri Stein

Business Type: Solo Practice

Years in Business: Less than 1-year

Counties Served: Spokane, Stevens, Whitman

Services Provided:

- Guardianship

Payment:

- Private Pay
- Medicaid

Contact: (509) 991-7848
Email: stetnpg@comcast.net

Thurston

Business Name: Senior Guardianship Services

Business Type: Guardian Agency

Years in Business: 24 years in guardianship

Counties Served: Thurston, Mason, Lewis

Services Provided:

- Guardianship
- Care Management
- Power of Attorney
- Representative of the Estate
- Fiduciary
- Trustee SNT
- Testamentary Trusts

Payment:

- Private Pay
- Medicaid

Specialties: Alzheimer's/ Dementias

Contact: (360) 943-7413

Email: Michele@seniorguardianship.com
Sarah@seniorguardianship.com

Business Name: Able Guardianship Services

Business Type: Agency

Years in Business: Since 2007

Counties Served: Thurston, Grays

Harbor, Lewis, Mason, Kitsap, King, Pierce

Services Provided:

- Guardianship
- Fiduciary

Payment:

- Private Pay
- Medicaid

Specialties: LGBT, Communities of color, Deaf (ASL)

Contact: (360) 515-9020

Email: cliff@ableguardianship.com

Walla Walla

Business Name: Omni Guardianship

CPGs: Marci Perkins
Nicholas J. Zaharevich
Armelia Zaharevich Rupp

Business Type: Agency

Years in Business: Since 1999

Counties Served: Walla Walla, Benton,

Franklin, Yakima, Garfield

Services Provided:

- Guardianship
- Power of Attorney

- Rep of Estate
- Fiduciary
- Care Management
- Mediators
- Guardian ad Litem (Title 11 & 26)
- Parent Coordinators

Payment:

- Private Pay
- Medicaid

Contact:

info@omniguardianship.com

Phone: (509) 337-3025; Toll Free: (877) 554-8199

Whatcom

Business Name: Senior Support Services, Inc.

CPGs: Iris Kingston, Jodi Wallace, Judy Glad

Business Type: Guardian Agency

Years in Business: 20+

Counties Served: Whatcom, Skagit,

Snohomish, Island

Services Provided:

- Guardianship
- Power of Attorney
- Rep of the Estate
- Fiduciary
- Care Management
- Trustee

Payment:

- Private Pay
- Medicaid

Contact:

Email:

admin@seniorsupportservicesinc.com

See also:

Benton County

See: Omni Guardianship (Walla Walla);

Peggy L. Mosshart (Yakima)

Franklin County

See: Omni Guardianship (Walla Walla):

Peggy L Mosshart (Yakima)

Garfield County

See: Omni Guardianship (Walla Walla)

Grays Harbor County

See: Able Guardianship Services (Thurston)

Island County

See: Senior Guardianship Services

Senior Support Services (Whatcom)

Miller Family Fiduciary, LLC (Snohomish)

King County—South

See: Richard King (Pierce)

Able Guardianship Services (Thurston)

Miller Family Fiduciary, LLC (Snohomish)

Kitsap County

Able Guardianship Services (Thurston)

Miller Family Fiduciary, LLC (Snohomish)

Sunrise Guardianship Services (Thurston)

Kittitas County

Peggy L. Mosshart (Yakima)

Lewis County

Able Guardianship Services (Thurston)

Mason County

See: Abbott & Associates (Kitsap)

Senior Guardianship Services (Thurston)

Able Guardianship Services (Thurston)

Pend Orielle County

See: Kristi Kilbourne

Pierce County

See: Able Guardianship Services (Thurston)

Skagit County

See: Senior Support Services, Inc.

Snohomish County

See: Clark "Erik" Eggertson (King);

Bridge Disability Ministries/S. Snohomish

(King); Senior Support Services (Whatcom)

See: Senior Guardianship Services

Stevens County

See: Kristi Kilbourne (Spokane); Terri Stein

Thurston County

See: Sunrise Guardianship Services (Pierce)

Whatcom County

See: Senior Support Services, Inc.

Whitman County

See: Terri Stein

Yakima County

See: Omni Guardianship (Walla Walla)