



The Guardian Institute

Administered by
Bridge Builders, Ltd.
Public Charity 501(c)3

January 2018
Volume 5, Issue 1

A NEW YEAR!

January starts a new year. In 2017, the Guardian Institute provided showcase examples of how the Guardian Institute can support low income clients as well as their lay and professional guardians. We will continue to do so in 2018. We have contracted with Detailz Event Management to improve and expand our conferences. We have been awarded our first grant to support our Clallam County Pilot Volunteer Guardian Advocate Program. We will be actively recruiting quality volunteers in Clallam County this year. Here are some, but not all, of the ways the Guardian Institute can provide support:

Mini-grants for client needs that are not covered by other resources. Examples include but are not limited to:

- Personal needs
- Medical needs not provided by Medicaid
- Housing support
- Transportation when Medicaid transportation isn't adequate

Low-interest short-term loans (the IRS requires interest to be paid)

- Home repairs in order to get a higher sale price
- Clearing out clutter
- Yard clean up

Attorney fees

Guardian fees: Supplement guardian fees for challenging cases
Provide experienced professional guardian **mentors** for lay and profession guardians who are struggling with a case or with their business

Contact the Guardian Institute if you are not sure if what you need will qualify. The Guardian Institute is still in its infancy and will make many changes before settling on a solid business model.

There are changes happening with the Certified Professional Guardianship Program at the Administrative Offices of the Courts. This is an opportunity for CPGs to become more involved in making changes to improve the program. Read the materials that are sent out for the CPG Board meetings and comment on them. Make every effort to attend the annual planning board meeting in April (held at the SeaTac Office). Attend the board meetings that are via conference calls.

We CPGs can be instrumental in making positive changes in the public's perception of guardianship if we work together.

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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

WEB SITE DEVELOPMENT

We been spread a bit thin but we are still working toward launching the web site soon! As volunteers are working on this, it is taking somewhat longer than we hoped. We will be moving the Guardian Profiles to the web site and we will also be developing a resource page for the web site and moving the following to it.

WASHINGTON CONNECTION

Created by DSHS in December 2010, [Washington Connection](#) provides information about a wide variety of services and offers customers the [online option to apply](#) for and renew services such as food, cash, childcare, long-term care, and assistance for people with disabilities.

The “[See If I Qualify](#)” pre-screening feature not only shows the customers what services they may be eligible for, it also displays many agencies’ websites where the customers can apply for additional services, such as employment, education and training programs.

Through continuous enhancements, more information becomes available on the “[Find Services](#)” page. Sixteen categories of services include those offered by non-profits, Tribes, and different types of government agencies.

Washington Connection also provides tools and resources for community partners that can help their customers apply for and renew benefits online. These tools include the [online registration](#), secure Partner Account, and “Client Search” feature. Resources available for partners include online tutorials, training webinars, marketing materials, newsletters, and consultations.

For those who are receiving services from DSHS or Health Care Authority, another feature called “Client Benefit Account” gives them the ability to monitor their benefit history, renew services, or update information online. This reduces the need for them to call or visit the office.

Washington Connection continues to build partnerships with other agencies in community outreach. The goal is to make services available to those in need so they can thrive in their communities. Please encourage your customers to visit Washington Connection today: www.washingtonconnection.org.

Contact: Alice.Liou@dshs.wa.gov

Thank you, Alice for providing this information. the English and Spanish “How Do I?” flyers are provided at the end of 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.

ASSISTANCE RECIPIENTS

Client A0004—Skagit County

Mini-grant awarded: \$2,400.00

Amount Expended: 0

Client A0004 is 23 years old with cognitive and medical conditions and not a US citizen. She currently lives in an Adult Family Home. The guardianship is funded through the Public Guardianship Program. She currently does not qualify for SSI or DDA services because she is not a US citizen. The guardian is working with an immigration attorney with the goal of getting her citizenship. She can work but needs a job coach and the job coach funding ran out. The Guardian Institute has approved a \$2,400.00 grant that will cover one-month of job coaching. While the guardian will try to recruit volunteers to help defray the cost but depending on the job she gets, this may or may not be possible. This client needs to be able to work at least until she can qualify for SSI or DDA or both. *The Guardian Institute does not have the funds available to commit to more than the initial month at this time.*

Additional donations are needed for continued job coaching.

Client A0005-Clallam County

Low-income loan awarded: \$2,200.00

Amount Expended: \$2,853.73

Client A0005 is currently in a skilled nursing facility and unable to return home. He owns a home, which is in deplorable condition. The funds were provided to get the place cleared out and additional funds were approved as the dump fees were higher than expected. The first offer fell through but there is now a new offer that we hope will go through. *Update: The house closed successfully and the Guardian Institute was re-paid for this loan. The funds are available for others who might need similar assistance. The interest rate on the loan was 1% as required by the IRS.*

If you are interested in donating to support these clients, please see the donation form in this newsletter or contact the Guardian Institute at info@bridgebldrs.com

CLALLAM COUNTY IS LOOKING FOR VOLUNTEER GUARDIAN ADVOCATES

There is a great need for guardians for our most vulnerable population. The Guardian Institute is looking for volunteers for the Volunteer Guardian Advocate pilot program, starting immediately. The time requirement is an average of five (5) hours each month and each volunteer is asked to commit for 3-years with optional renewal. A Volunteer Guardian Advocate is NOT a caregiver. A Volunteer Guardian Advocate is to advocate for their client's needs and appropriate wants, ensure the client is getting the benefit of all the resources he/she qualified for, assist the client with making medical decisions or make medical decisions on the client's behalf if the client cannot do so.

Basic Requirements:

- Be at least 18 years old
- Be of sound mind
- Have no felony convictions
- Have no misdemeanor convictions involving moral turpitude
- Be a resident of Washington State
- Have completed mandatory (online) training
- Be a person who the court finds suitable
- Commitment renewal every 3-years
- Average time needed is 5-hours monthly

The Guardian Institute will provide:

- Arrange legal assistance as needed
- In-person training
- Provide a mentor as needed
- Assistance with Standby Guardian requirement

Contact Bridge Builders, Ltd at (360) 683-8334 or at info@bridgebldrs.com for more information.

15TH ANNUAL GUARDIAN INSTITUTE SPRING CONFERENCE

Early Sponsors:

- ◇ Oppenheimer & Co. Inc—Registration Sponsor
- ◇ The Bar Plan

Interested in attending all or part of the conference? We have our registration sheet on page 6.

Confirmed Speakers in no particular order:

Guardianship and Resources for Medicaid Clients

Presenter: Ian Horlor, DSHS Financial Subject Matter Expert, Home & Community Services

Pre-Need Funeral and Cemetery Arrangements

Presenter: Robert Wasserman, Harper Ridgeview Funeral Chapel

Fiduciary efficiency, accuracy, accountings, etc.

Panel Discussion: Christopher D. Ayers, MBA is the Director of Guardianship and former Fiduciary Director at Share and Care House; Charlene Hamblen, CPG is the Executive Director of Share & Care House and the Chief Financial Officer of Precision Accountability; Linda Custer, CPG, Share & Care House.

Joel's Law: Petitioning for Mental Health Detention

Presenters: Robin Balsam, Robin H. Balsam, P.S.; Suzanne Thompson Winingar, Campbell Thomsen, Winingar, PLLC

Incapacitation, its various meanings, and the overlap with guardianships and criminal law

Presenter: Michelle E. Nisle, Miller Nash Graham and Dunn, LLP

Best Practices for Case Management—Setting up a new case

Victoria Kesala, Kesala Law Office

Succession Planning for CPGs

Victoria Kesala, Kesala Law Office

7 Questions to Ask Your Financial Advisors—Fiduciary Ethics

Darryl Lynch, Oppenheimer Co. Inc.

Guardianship of Individuals with Disabilities—A Concrete Approach

Jenny Nickl, CPG

Immigration 101

AnnaRae Goethe, NW Immigration Rights Project

Cultural Diversity and Locating Interpreter Assistance

AnnaRae Goethe and Liz Dunbar, NW Immigration Rights Project

CONTINUING EDUCATION

Guardian Institute Spring Conference

(formerly the CPG CE Conference—Bremerton)

Tuesday & Wednesday, March 20 & 21, 2018

Venue: Kitsap Conference Center, Bremerton

Guardian Institute Fall Conference

(formerly the CPG CE Conference—Spokane)

September 2018 (Dates TBA)

Venue: TBA

National Conference on Guardianship

October 20-23, 2018

Venue: Renaissance Palm Springs, Palm Springs, California

National Conference on Guardianship

October 12-15, 2019

Venue: Griffin Gate Marriott, Lexington, Kentucky

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

Thinking About Tax Deductible Donations?

Please consider the Guardian Institute this year. We provide support for individuals under guardianship as well as to lay and certified professional guardians.

You may designate where you would like your funds to be used:

- General fund
- Mini-grants for clients
- Low-interest loans for clients
- Legal fees for low income clients
- Education scholarships lay or professional guardians
- You designate



15TH ANNUAL GUARDIAN INSTITUTE BREMERTON CONFERENCE

Administered by: Bridge Builders, Ltd

Monday & Tuesday | March 20 & 21, 2108

REGISTRATION FEE: \$400.00.
This includes a hot breakfast and lunch each day.

Payment must be received on or before March 6, 2018.

Starting March 7, 2018, the registration fee increases to \$500.00.

Name: _____

Business: _____

Address: _____

City: _____ State: _____

Zip: _____ Phone: _____

Email: _____

CPG# _____ WSBA# _____

HANDOUTS

Materials will be provided on a USB Memory Stick. If you wish to have the handouts in a coursebook, check below and add \$25.00 to your registration.

_____ Binder/paper coursebook

ATTENDANCE

_____ Full 2-day conference

_____ Individual sessions
(please write the sessions chosen on a separate page)

SCHOLARSHIP APPLICATION CPG CE CONFERENCE

Scholarships are available that will take \$200.00 off the registration fee for lay and professional guardians. There are five available for this conference. You must fill out a registration form as well as this scholarship form in order to be considered. The deadline is February 1, 2018 or all of the scholarships are awarded. Fax the registration and scholarship applications to (360) 683-8358 or email to info@bridgebltrs.com.

Name _____

Address _____

City _____ State _____ Zip _____

Phone _____ Email _____

County _____ CPG (CPG# _____)

If you have any questions, call (360) 683-8334.

PAYMENT INFORMATION

Check: Please make your check payable to The Guardian Institute
FAX: 360-683-8358
Address: PO Box 610, Sequim, WA 98382

Credit Card: Visa Mastercard Amount: _____

CC# _____

Security code: _____ Exp. Date: ____/____

Name on Credit Card: _____

Signature: _____

Billing address: _____

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 March 1, 2018.

CONFERENCE PARKING IS FREE.

LODGING

The Hampton Inn & Suites has a conference rate of \$129.00 per night.
Call: 360-405-0200 **Tell them you are with the GUARDIAN INSTITUTE.**
Reservations must be made by February 19, 2018 to receive this rate.
Parking is \$7.00 per night.

Contact us at info@bridgebltrs.com or (360) 683-8334 if you do not receive a written or email registration confirmation!

Lay Guardian (Please provide the case number of the guardianship you are responsible for _____)

How long have you been a guardian? _____

If a CPG:

Solo Practice Agency How long have you been in business? _____

How many guardianship clients do you currently have? _____

Do you provide additional services other than guardianship services?

_____ No _____ Yes If yes, please list your other services:

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.

Sponsors

Purple Cross, Dave Martin, Tacoma
True Link Financial, San Francisco, CA
Sunshine Home Health, Spokane
Horizon Hospice, Spokane

Vendors

Comfort Keepers, Carrie Mulcahy, GM, Bremerton
Concerto Health, Scott Person, Renton
Exact GPS, Charlene Hamblin, Puyallup

In-Kind Donations

Bridge Builders, Ltd, Sequim
Oppenheimer & Co. Inc (Darryl Lynch), Bellevue
Platt Irwin law Firm, Port Angeles
Waddell & Reed Financial Advisors (John Zalevitis), Spokane

Individual Donations

Denise Brown
Brenda Carpenter, CPG
Commencement Bay Guardianship Services, Tacoma
Jenny Nickl, CPG, Tumwater
South Sound Alternatives, Inc., Spanaway
Whipple Law Group, PLLC, Michael D. Whipple, Spokane
Sari Spieler, CPG

Supporting through Conference Attendance

(*means also a speaker)

- 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 (Bremerton & Spokane)
- Mindi Blanchard, M.Ed., CPG, Sequim*
- Theresa Boyle, CPG, Gig Harbor

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

Conference Speakers—Spokane

- Commissioner Rachel Anderson, Spokane Superior Court
- Maryann Brady, Spokane County Prosecutor
- Lynda Clark, CPG, Safe Haven Guardianship
- Darryl Lynch, Executive Director—Investments, Oppenheimer & Co, Inc
- Cecilia Owsley, RN, BSN, Alzheimer's Association
- Jane Pimentel, Ph. D., Alzheimer's Association
- RaMona Pinto, Brain Injury Alliance of Washington
- Dan Rees, DSHS, Financial Subject Matter Expert
- Kurt Risley, Ph.D., We Create Peace, Inc.

- Clare KC Brown, CPG, Maple Valley
- Peggy Bureta, CPG, Spokane
- Paul Calobero, CPG, Spokane
- Brenda Carpenter, CPG, Sequim*

Attendees, Con't

- Debra Christnacht, CPG, Tacoma
- James Christnacht, Attorney, CPG, Tacoma
- Clark, Lynda, CPG, Spokane*
- Leslie Cook, CPG, Bellingham
- Winston Cook, CPG, Medical Lake
- Linda Custer, CPG, Puyallup
- Sally Denton, CPG, Post Falls, ID
- Steven Depner, CPG, Spokane
- Susan Dougherty-Guild, CPG, Bellevue
- Karla Edwards, CPG, Des Moines

Volunteer Hours for 2017: 161.4

Partial CPG Scholarships awarded: 10

Attendees, Con't

- Kristen Eickstadt, CPG, Spokane
- T.L. Nicole Emanuel, Pending, Spanaway
- Renee Ewalt, Attorney, GAL, CPG
- Michelle Ewert, CPG, Bellevue
- Anita Farr, CPG, Colfax (Bremerton & Spokane)
- Dale Frederickson, CPG, Spokane
- Nancy Frederickson, CPG, Spokane
- Meghn Glass, CPG, Spokane
- Geniece Gregory, CPG, Sammamish
- Michael Gross, Ph.D., CPG, Kent
- Joshua Guthmueller, CPG, Spokane
- Charlene Hamblen, CPG, Puyallup
- Cynthia Hanning, CPG, Edmonds
- Stephanie Inslee, CPG, Bellingham
- John Jardine, CPG, Seattle
- Melissa Johnson, CPG, Puyallup
- Tracy Johnson, CPG, Puyallup
- Patricia Joubert, CPG, Bremerton
- Elaine Judd, CPG, Humptulips
- David Keene, CPG, Lewiston, ID
- Richard King, CPG, University Place
- Iris Kingston, CPG, Bellingham
- Grace Kittredge, Spokane
- Deborah Lawrence, CPG, Puyallup
- Don Lewis, Seattle
- Mack Lievense, Attorney, CPG, Gig Harbor
- Joseph McKinnon, CPG, Spokane
- Elizabeth Lindley, CPG, Seattle
- Ramona Mather, CPG, Readon
- Susan Mattern, CPG, Tacoma
- Cindy Maxwell, CPG, Bellingham
- Lorelee McDonald-Williams, CPG, Spanaway
- Patricia McIntosh, CPG, Silverdale
- Chris Medley, Pending, Tacoma
- Kaarina Mewhinney, CPG, Medical Lake
- Jenifer Mick, CPG, Seabeck
- Sarah Mills, CPG, Renton
- Kelly Moore, CPG, Spokane
- Katrina Morales, CPG, College Place
- 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 (Bremerton & Spokane)
- Diane Pearson, CPG, Poulsbo
- Beth Peoples, CPG, Federal Way
- Marci Perkins, CPG, Waitsburg
- Yvonne Polkow, CPG, Vancouver
- Steven Posalski, CPG, Seattle
- Susan Pritchard, CPG, Poulsbo
- Frank Puschak, CPG, Spokane (Bremerton & Spokane)
- Tracy Raymond, CPG, Sumner
- Judith Robertson, CPG, Spokane
- Jacque Robeson, CPG, Asotin (Bremerton & Spokane)
- Robert "Larry" Robeson, CPG, Asotin (Bremerton & Spokane)
- Janene Robinson, CPG, Graham
- Robert Russel, CPG, Wenatchee
- Laura Ryan, CPG, Medical Lake
- Laura Schmidt, CPG, Tacoma
- Michael Schmidt, CPG, Tacoma
- Joan, Shoemaker, CPG, Colbert
- Thea Skomo, CPG, Spokane (Bremerton & Spokane)
- Lori Sorensen, CPG, Entiat
- Sari Spieler, CPG, Freeland
- Elizabeth Stone, CPG, Tacoma
- Kathleen Traci, CPG, Port Ludlow
- Stephen Trefts, Attorney, CPG, Spokane (Bremerton & Spokane)
- Jodi Wallace, CPG, Bellingham
- Michael Whipple, CPG, Spokane
- Vicki Williams, CPG, Vancouver
- Sean Williams, CPG, Vancouver
- Albert "Doc" Williams, CPG, Spanaway
- Bernadine Wilson, CPG, Spokane Valley
- Paula Wind, CPG, Chehalis
- Amanda Witthauer, CPG, Veradall
- Cheryl Wood, CPG, Spokane
- Jana Worthington, CPG, Spokane
- Amber Zabel, CPG, Vancouver
- Nicholas Zaharevich, CPG, Waitsburg
- Armelia Zaharevich, CPG, Waitsburg

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**

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

Washington State Certified Professional Guardian Profiles by County

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

Clallam County

Business Name: Bridge Builders, Ltd

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

Business Type: Guardian Agency

Years in Business: Since 2003

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

Cowlitz County

Business Name: Grace Guardianship Services, LLC.

CPG: Pauline Trefren, CPG

Business Type: Solo Practice

Years in Business: Since 2015

Counties Served: Cowlitz; Clark Lewis

Services Provided:

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

Payment:

- Private Pay
- Medicaid
- Pro Bono

Specialties: Elderly and vulnerable adults 50+ years of age.

Jefferson County

Business Name: Caring Choices

CPG: Elaine Morgan, CPG

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 Choices—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 County

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: pattyc@bridgemin.org

Website: www.bridgemin.org

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

Business Name: Michaels Angels

CPG: Dr. Michael Gross

Business Type: Solo Practice

Years in Business: 7

Counties Served: King, Pierce, Snohomish,
Thurston

Services Provided:

- Guardianship
- Power of Attorney
- Rep of Estate

Payment:

- Private Pay
- Medicaid
- Pro Bono

Contact: (253) 222-1096**Email:** miangelss@juno.com

Kitsap County

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

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 20 years 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

Pierce County

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

Contact: sunguardsharon@gmail.com

Snohomish County

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 County

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

Thurston County

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 Services: Thurston, Grays Harbor, Lewis, Mason, Kitsap, King, Pierce

Services Provided:

- Guardianship
- Fiduciary

Payment:

- Private Pay
- Medicaid

Specialties: LGBT, Deaf (ASL)

Contact: (360) 515-9020

Email: cliff@ableguardianship.com

Walla Walla County

Business Name: Omni Guardianship

CPGs: Marci Perkins

Nicholas J. Zaharevich

Armelia Zaharevich Rupp

Business Type: Agency

Years in Business: Since 1999

Counties Served: 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:

Email: info@omniguardianship.com

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

Whatcom County

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

Yakima County

Business Name: Peggy L. Mosshart

CPGs: Peggy L. Mosshart

Business Type: Solo Practice

Years in Business: Since April 2013

Counties Served: Yakima, Benton-Franklin, Kittitas

Services Provided:

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

Payment:

- Private Pay
- Medicaid
- Public Guardian

Contact: (509) 910-8402

Other: PO Box 3035, Union Gap, WA 98903

Email: plmosshart@msn.com

See Also:

Asotin County

Omni Guardianship (Walla Walla)

Benton County

Omni Guardianship (Walla Walla);

Peggy L. Mosshart (Yakima)

Clark County

Grace Guardianship Services, LLC (Cowlitz)

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)

Jefferson County

Bridge Builders, Ltd (Clallam)

King County—South

See: Richard King (Pierce)

Able Guardianship Services (Thurston)

Miller Family Fiduciary, LLC (Snohomish)

Kitsap County

Able Guardianship Services (Thurston)

Bridge Builders, Ltd (North Kitsap only)

Miller Family Fiduciary, LLC (Snohomish)

Sunrise Guardianship Services (Thurston)

Kittitas County

Peggy L. Mosshart (Yakima)

Lewis County

Able Guardianship Services (Thurston)

Grace guardianship Services, LLC (Cowlitz)

Mason County

See: Abbott & Associates (Kitsap)

Senior Guardianship Services (Thurston)

Able Guardianship Services (Thurston)

Pend Oreille County

See: Kristi Kilbourne

Pierce County

Able Guardianship Services (Thurston)

Michaels Angels (King)

Skagit County

See: Senior Support Services, Inc.

Snohomish County

See: Clark "Erik" Eggertson (King);

Bridge Disability Ministries/S. Snohomish
(King)

Michaels Angels (King)

Senior Support Services (Whatcom)

Stevens County

See: Kristi Kilbourne (Spokane); Terri Stein

Thurston County

Michaels Angels (King)

Sunrise Guardianship Services (Pierce)

Whatcom County

See: Senior Support Services, Inc.

Whitman County

See: Terri Stein

Yakima County

Peggy L. Mosshart (Yakima)

Omni Guardianship (Walla Walla)

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? _____
