



# The Guardian Institute

Administered by  
Bridge Builders, Ltd.

Public Charity 501(c)3

February 2017  
Volume 4, Issue 2

## 14th Annual CPG CE Conference Bremerton Registration in on page 6

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### DID YOU KNOW?

- ◆ The continuing education conferences are our largest source of funding; netting after conference expenses, just over \$18,000? This includes the sponsors and vendors.
- ◆ In 2016, Administrative fees were only 11%? Mindi Blanchard's time is strictly voluntary.
- ◆ The Guardian institute offers ten (10) partial scholarships a year? Five for the Bremerton conference and five for the Spokane conference.
- ◆ The Guardian Institute supports professional and lay guardians to assist them in the challenging jobs advocating for clients and family members?

### 2017 GOALS

- ◆ 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](mailto: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](mailto:info@bridgebldrs.com).**



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PO Box 610  
212 Center Park Way  
Sequim, WA 98382  
[info@bridgebldrs.com](mailto:info@bridgebldrs.com)  
(360) 683-8334

## ASSISTANCE RECIPIENTS

*Client A0002—Clallam County*

*Mini-grant amount awarded: TBA*

*Amount Expended: \$0*

[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 moved out. 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 Institute will assist with any difference once the amount awarded from the local service agency. The client is now at the top of the list for low income housing so we hope 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 that needs to be sold. However, the contents of the house needs to be removed in order to be able to get a quicker sale and to ask a higher price. The Guardian Institute Board has approved a short term loan, to be paid back at the sale of the home, 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](mailto:info@bridgebldrs.com). The Guardian Institute will arrange to connect you with the agency.

## **HELP WANTED—APPRENTICE OR INTERN GUARDIAN**

Bridge Builders, Ltd provides quality guardianship, care management and fiduciary services on the North Olympic Peninsula and is looking for a candidate who would like to become certified as a Certified Professional Guardian.

The candidate would need to reside in Clallam, Jefferson or Kitsap counties, be provisionally certified by the Certified Professional Guardian Board as a condition of employment. The chosen individual would work on a part-time and per diem basis as an apprentice guardian until receiving certification as a professional guardian. Bridge Builders, Ltd would negotiate a reimbursement plan for the costs associated with becoming certified as a professional guardian. Upon certification, the candidate would be able to have a separate personal guardianship caseload and contract with Bridge Builders, Ltd to provide guardianship services for them.

To find out about the Certified Professional Guardian Program and provisional certification, go to: <http://www.courts.wa.gov/guardianportal/index.cfm?fa=guardianportal.cpg&content=qualifications>.

After reading the requirement, please contact Bridge Builders, Ltd for an employment packet at [info@bridgeblldr.com](mailto:info@bridgeblldr.com). Please put “Guardian” in the subject line.

You may also call Mindi Blanchard or Brenda Carpenter at (360) 683-8334 with any questions.

## **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 IV**

### ***Working Efficiently***

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

Any business owner knows that time is money. The challenge is how to work the most efficiently. During the early days, while still struggling to grow the business into a viable money-maker, the business owner is focused more on getting new business in the door; but as the business matures, a business owner needs to critically assess how time is being used and develop policies and procedures for the employer and employees so that everyone can work more efficiently. As a small business, working “lean” is essential to the survival of the business.

We at Bridge Builders, Ltd have spent a lot of time critically assessing how to work more efficiently. To begin with I developed a simple excel spreadsheet and told everyone, including me, to document all their time, billable

*Continued on page 4*

and non-billable time. The unexpected consequence of this was that I lost a few employees. As it turned out, these employees were not billing all the time they spent with clients or accounting for all the time I was paying them to work. One employee couldn't understand why this was a problem because she didn't charge the business for the time she spent with the clients and that she didn't put the time on her timesheet. She just didn't understand that as an employee of Bridge Builders, Ltd, she represented the company, on the clock or off the clock, and if something bad happened during this "volunteer" time, Bridge Builders, Ltd was liable. It was also essentially stealing money from the business and setting a bad precedent with clients. I then made a policy that no employee can see any clients without my knowledge and approval. This doesn't mean that they must officially ask permission each time they want to visit a client. We have a shared calendar where I can see who is scheduled to see whom. If it is something last minute, an employee will just tell me where she is going or leave me an email. We continue to use the spreadsheet. My employees usually know what is billable but if one of them isn't sure, she just changes the font color to red so that I know to review it. The nice thing with excel is that I can sort several different ways and total the billable hours on a weekly basis. I have target totals for each week and if the billable time is lagging behind, I will tell my employees to focus on billable time and as much as possible leave the non-billable tasks for later. It is amazing how this can improve the numbers.

We have a staff meeting every Monday morning to review all our "active" clients. Bridge Builders, Ltd does more than guardianship and many of our clients are served on an "as needed" basis. I pass out a list of the clients and we go down the list and bring each other up-to-date on any changes, problems or improvements. We also work out a plan if a client is in crisis or there is a problem. These plans can always be adjusted but it helps to have a general plan. We decide which clients need to be visited that week and assign who is to visit whom. This makes the week go more smoothly. Our goal is to have our clients as stable as possible by Friday as that makes the weekend nicer for whoever is on call.

We have "emergency files" on all our active clients. These files include the following: Client profile with the client's personal information, doctors information, insurance information, family & friends information; a copy of our legal documents for the client (Letters of Guardianship or Power of Attorney); copy of the Order Appointing the Guardian if the guardianship is limited; copy of the Standby Guardian document; Copy of the medical cards, Copy of the picture ID, Copy of the healthcare directive and/or POLST; and we put a pocket in the back to hold their insurance cards and picture ID if we have them. If they live independently, we include a copy of their diagnoses and medication list. If a client has a medical appointment or goes to the hospital, instead of rifling through files to find this information, we basically have it at our fingertips. We have a designated file drawer just for these files, which makes it much easier to find them. More recently, we have focused on having most of our documents scanned into our computer. It's much easier to find documents on the computer than looking through paper files to find something. We each have a Scan Snap [brand name] scanner at our desk. They are on the pricey side at around \$500 each but they are fast feeder scanners and have paid for themselves many times over in saving us time in filing (non-essential documents are scanned into the computer and shredded instead of filed). If someone calls requesting information it is now rare that we must spend time going through the paper files to find the information as it is at our fingertips. Make sure that you have a hard drive back up as well as a cloud back up.

We are located in a rural community. The next town is a thirty-minute drive so we have developed a policy that if anyone is going to the next town, that person asks the others if there is anything that needs to be delivered or if something else needs to be done. Before returning to Sequim, that person calls the office to see if there is anything that has come up that can be done before returning to the office. Since the only hospital is in the next town, if we learn that a client is being transported to the hospital, whoever is already in that town can swing by the hospital to check on the client.

As Bridge Builders, Ltd has grown, our phones ring quite a lot. Mostly, callers want to talk with Brenda or me. In order to keep us from being interrupted all day, the bookkeeper or that care manager answers the phone first and screens the call. Often, they can answer simple questions. If the caller insists on talking with Brenda or me, the staff who answers the phone will ask what the call is regarding. If my staff can tell me what the caller wants, often I can just verbally give my staff person the answer instead of taking the call. This saves Brenda and me a lot of time.

I challenge readers to email their time-saving tips to [info@bridgebldr.com](mailto:info@bridgebldr.com) and I will print them in a future newsletter.

## CONTINUING EDUCATION

### *14th Annual CPG CE Conference Bremerton*

Tuesday & Wednesday, March 28th & 29, 2017

Venue: Kitsap Conference Center Harborside, Bremerton

If you are interested in being a vendor or sponsor for this and other Guardian Institute organized conferences, please email us at [info@bridgebldrs.com](mailto:info@bridgebldrs.com). In 2017, there will be a variety of ways those wanting to support the Guardian Institute by helping to defray the costs involved in these events.

#### **Speakers, March 28**

- Mindi R. Blanchard, **The Guardian Institute**
- Carla Calogero, Reed & Longyear Law: **TBA**
- Ian Horlor, DSHS: **Extraordinary Fees**
- Darryl Lynch, Oppenheimer & Co.: **Lowering Your Liability when Advising Your Client's Assets**
- Lin O'Dell, Attorney, CPG, GAL: **Problem Guardianship as Presented by the Experts**
- Sister Sharon Parks, WA State Catholic Conference: **TBA**
- Gabrielle Richards, Attorney, Martin & Richards LLP: **Implicit Bias: A Practical Toolkit**

#### **Panel Participants, March 29**

- Robin Balsam, Attorney, CPG, Balsam Law
- Brenda Carpenter, CPG
- Seth Dickey, AAG
- Lin O'Dell, Attorney, CPG, GAL
- Michelle Graham, Graham & Graham
- Jenny Nickl, CPG
- TBA—DSHS Financial & Social Work Supervisors
- Tony Jones, Realtor, Northwest Home Sales

### *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*

# 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](mailto: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](mailto: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

## 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

**Volunteer Hours for 2017: 13.2**

**Partial CPG Scholarships awarded: 1**

## Conference Speakers—Bremerton

- Robin Balsam, Balsam Law
- Mindi R. Blanchard, M.Ed., CPG, Guardian Institute
- Brenda Carpenter, CPG, Bridge Builders, Ltd.
- Lin O'Dell, Attorney, CPG, GAL
- 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-to-date — Bremerton

- Robin Balsam, attorney, CPG
- Mindi Blanchard, M.Ed., CPG
- Clare KC Brown, CPG
- Brenda Carpenter, CPG
- Linda Custer, CPG
- Susan Dougherty-Guild, CPG
- Renee Ewalt, Attorney, GAL, CPG
- Michelle Ewert, CPG
- Meghn Glass, CPG
- Geniece Gregory, CPG
- Charlene Hamblen, CPG
- Cynthia Hanning, CPG
- Stephanie Inslee, CPG
- Richard King, CPG
- Deborah Lawrence, CPG
- Cindy Maxwell, CPG
- Jenifer Mick, CPG
- Linda Navage, CPG
- Virginia Nickl, CPG
- Lin O'Dell, Attorney, GAL, CPG
- Tracy Raymond, CPG
- Janene Robinson, CPG
- Laura Schmidt, CPG
- Michael Schmidt, CPG
- Sari Spieler, CPG
- Stephen Trefts, CPG
- Vicki Williams, CPG
- Sean Williams, CPG
- Paula Wind, CPG
- Amber Zabel, CPG

# *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](mailto: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**

# 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:** clif@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:** Peggy L. Mosshart, Iris Kingston, Jodi Wallace, Judy Glad

**Business Type:** Guardian Agency

**Years in Business:** 20+

**Counties Served:** Whatcom, Skagit

**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

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);

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)

# Complimentary Guardian Profile

Please complete and email to [info@bridgebldrs.com](mailto: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? \_\_\_\_\_

\_\_\_\_\_