



The Guardian Institute

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

July 2018
Volume 5, Issue 6

5TH ANNUAL GUARDIANSHIP CONFERENCE—SPOKANE

We have expanded the Spokane conference! This conference is open to anyone who is interested.

Those who attended the 2017 Spokane conference received the following credits:

6-General 4-Emerging Issues 2-Ethics

However, we realize that there may be those who wish to attend this year who need a different blend of credits. So, in an effort to accommodate as many attendees as possible, we will be offering some breakout sessions with a total number of credits/categories as follows:

11-General 3-Emerging Issues 3-Ethics

Six (6) credit maximum can be taking each day.

NOTE: Some of our speakers presented the same topics at the 2018 Bremerton conference. If you attended a Bremerton presentation, you cannot receive credit if you attend the same presentation in Spokane. However, we've done our best to provide a full compliment mixture that should work for most everyone.

Four (4) partial scholarships are still available for this conference. Registration for the full two-day conference must be submitted with the scholarship application in order to qualify. The scholarships go quickly. The application is on the registration form in the conference brochure starting on page 10 of this newsletter.

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SPOKANE CONFERENCE CONTINUED

For those who want to take individual sessions, because of the costs involved in organizing these conferences, we need to change the rate to \$50 per session with a minimum of two sessions per day.

THE IMPORTANCE OF SAVING EXPLANATIONS OF BENEFITS (EOB'S)

It seems that our low-income clients always end up at the short end of the stick when there are changes to laws that affect medical care. Not long ago, it was that Medicare would pay for an ambulance to the emergency room but not home, even for clients with severe dementia. In order to appeal, which we at Bridge Builders, Ltd. did successfully a number of times, EOBs for the date of service are needed. Somehow things have adjusted and we haven't had to appeal for this situation for a while.

Now with the change in the laws regarding Opioids, doctors are prescribing over-the-counter (OTC) remedies instead of going directly to a controlled substance. For this I laude the new law because many times the OTC remedies work well and they don't have the risk of falls and other problems that the controlled substances have. However, when a client is on Medicaid, OTC medications are not automatically paid. Until recently, we didn't have too much trouble with this as we would fax DSHS the prescription from the doctor and the documentation from the Medicare Part D plan showing that the Medicare Part D plan denied it. We would appeal and that would be denied and we would include these and DSHS would make an adjustment in participation in order to accommodate the cost of the OTC. But this didn't work recently. When we asked we were told that according to the WAC 182-513-1350 they did not have verification that the drug prescribed was medically necessary (they assume that the doctor prescribed it just for giggles?) and they needed notice that an appeal had been filed with Medicare to have this prescription covered.

When we questioned this we were told that a letter from the doctor was necessary saying that the medication was medically necessary (again, the doctor prescribed it just for giggles?). We said that we had submitted the appeal to Medicare Part D, but were told that we needed to submit an appeal to regular Medicare even though our client was not in a skilled nursing facility. Again, in order to do the appeal, one needs the EOB.

Fortunately, we scan all EOBs into the computer labeled by date so that we (or more likely, my wonderful bookkeeper) can find what we need fairly easily. But, good grief!, this OTC medication was far less expensive than the Opioid and without the side-effect of becoming a fall risk. And then there is the fact that we as guardian for this pro bono client get paid nothing for the additional work required so that our client doesn't get less for personal needs.

This is not the fault of the DSHS financial people. It is the crazy way our government does things. And, yes, I know that I'm ranting about the System but what about the EOBs? Well, we guardians need to keep those EOBs and file them in a way that is meaningful to each of us. If a guardian throws these away, then when an appeal is needed, it requires much, much more work. Scanning is the way to go, if you ask me. Not the slow flatbed scanners but the feeder scanners like ScanSnap. They are on the expensive side but they can save hours upon hours of time on the long run.

Mindi R. Blanchard, M.Ed., CPG

HELP WANTED

Established Certified Professional Guardian Agency seeks an additional CPG to assist in meeting the care needs of the individuals we serve in Grays Harbor, King, Kitsap, Lewis, Mason, Thurston, and Pierce counties. Please send resume to Clif@ableguardianship.com.

JOB DESCRIPTION A Client Advocate (CPG) serves as an employee of the Guardianship Agency for incapacitated adults and acts in accord with their best interest as an advocate and substitute decision-maker.

Hours: Part-time, as needed, approximately 10-20 hours per week. (1-3 days of work per week)

Compensation: DOQ, \$30 per hour; mileage reimbursed at 0.545 cent per mile.

Essential Job Responsibilities

- Conduct initial, and quarterly visits with assigned clients of the agency (unless an alternate visitation schedule is established by court order)
- Confer with the Incapacitated Person, family members, and healthcare professionals, as appropriate.
- Prepare meaningful in-person visit reports addressing changes or concerns in the general health and welfare of clients.
- Prepare and maintain a record of all work-related activities and contacts performed on behalf of the individual, submits this information to the Agency Director within 24 hours of provision of services.
- Other duties as assigned.

Required Knowledge, Skills and Abilities

- Comfortable asserting self in role of advocate
- Work compassionately with difficult clients and situations
- Must have a working knowledge of community resources
- Must have reliable transportation to locations that may or may not be located on public transportation lines to provide services to individuals in the community
- Ability to maintain strict confidentiality of client information.

Qualification Standards

- Must hold an active Certified Professional Guardian (CPG) designation in Washington state
- Bachelor's degree preferred in health and human services, nursing, or related discipline
- At least 1 year experience serving individuals with developmental disability, mental illness, or the elderly.
- Additional experience in fields of long term care, dementia and related illnesses, substance abuse, traumatic brain injury, and related available services desirable

Miscellaneous

- Must be able to pass a drug test and background check prior to employment
- LGBT-friendly working environment

ASSISTANCE RECIPIENTS

Client A0004—Skagit County

Mini-grant awarded: \$2,400.00

Amount Expended: \$900.00

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. *There has been some delay in starting the job coaching. The CPG has negotiated a lower hourly rate. If for some reason this plan cannot be implemented, the GI Board has approved using the funds for other needs the client might have.*

Additional donations are needed for continued job coaching.

If you want to apply for a mini-grant or short-term loan on behalf of a guardianship client, please contact the Guardian Institute at info@bridgebldrs.com. The Guardian Institute is willing to consider other financial requests as well.

If you are interested in donating to support these clients, please see the donation form.

CLALLAM COUNTY IS LOOKING FOR VOLUNTEER GUARDIAN ADVOCATES

We have our first volunteer! Now , we're working on figuring out how to connect a potential guardian with an incapacitated individual in need of a guardian. Several people are working on this conundrum.

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
- 1-2 guardianship limit per volunteer
-

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

The Guardian Institute will provide:

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

CONTINUING EDUCATION

Guardian Institute Fall Conference

(formerly the CPG CE Conference—Spokane)

Tuesday & Wednesday, September 18 & 19, 2018

Venue: Red Lion River Inn—Spokane

Spokane Sponsors & Exhibitors

- ◇ *CarePatrol of Spokane—Registration Sponsor*
- ◇ *Oppheimer & Co, Inc—Break Sponsor*
- ◇ *Purple Cross—Exhibitor*
- ◇ *The Bar Plan—Exhibitor*
- ◇ *EXACT GPS—Exhibitor*

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

Thank You to all our 2018 Contributors!

Registration Sponsor, Bremerton

Break Sponsor, Spokane



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

Program Sponsor



Registration Sponsor, Spokane



Exhibitors

Exact GPS, Charlene Hamblin, Puyallup (Bremerton & Spokane)
File Center, Lucion.com—Utah (Bremerton)
Purple Cross, Dave Martin, Tacoma (Bremerton & Spokane)
The Bar Plan Mutual Insurance, Missouri (Bremerton & Spokane)
Washington Association of Professional Guardians (Bremerton)

In-Kind Donations

Bridge Builders, Ltd, Sequim

Individual Donations

Denise Brown

Grants Received

\$2,500—Ben & Myrtle Walkling Memorial Trust
(Clallam County)

Volunteer Hours for 2018: 83.1

Partial CPG Scholarships awarded for 2018: 6

Supporting through Conference Attendance (*means also a speaker)

- Dewey Abbott, CPG, Port Orchard
- Karen Abbott, CPG, Port Orchard
- Kevin Ahl, CPG, Poulsbo
- John Anderson, CPG, Bothell

Conference Speakers—Bremerton

- Robin Balsam, Robin H. Balsam, P.S.
- Mindi R. Blanchard, M.Ed., CPG, Guardian Institute
- Brenda Carpenter, CPG, Bridge Builders, Ltd.
- Liz Dunbar, NW Immigration Rights Project
- AnnaRae Goethe, NW Immigration Rights Project
- William Grimes, MD
- Charlene Hamblen, CPG, and staff, Share & Care House
- Ian Horlor, Financial Subject Matter Expert, DSHS
- Victoria Kesala, Kesala Law
- Kim Edgar, The Bar Plan
- Darryl Lynch, Executive Director—Investments, Oppenheimer & Co.
- Jenny Nickl, CPG
- Michelle Nisle, Miller Nash Graham & Dunn, LLP
- Karen Reeder, RN, Assured Hospice
- Brian Santo, Developmental Disabilities Administration
- Suzanne Thompson, Campbell Thompson, Wininger, PLLC
- Robert Wasserman, Peninsula Funerals, LLC & Peninsula Cemeteries, LLC

Conference Speakers—Spokane

- Commissioner Rachel Anderson, Spokane Superior Court
- Mindi R. Blanchard, M.Ed., CPG, Bridge Builders, Ltd.
- Kim Edgar, The Bar Plan
- Steve Einhaus, Peer Specialist at Eastern State Hospital
- Steve Graham, Law Office of Steve Graham
- Charlene Hamblen, CPG, Share & Care House
- Lisa Herrera, Staff Attorney, Northwest Immigrant Rights Project
- Robin Johnson, Spokane Hospice
- Darryl Lynch, Executive Director—Investments, Oppenheimer & Co, Inc
- Judge Kevin Naught, Yakima County Superior Court
- Kim McKenna, SHIBA Coordinator, DSHS
- RaMona Pinto, Brain Injury Alliance of Washington
- Dan Rees, DSHS, Financial Subject Matter Expert
- Jordan Storhaug, MD, Providence North Pines Clinic, Spokane
- Larry Weiser, Professor Emeritus of Gonzaga University

- Rebecca Bailey, LICSW, CPG, Covington
- Robin Balsam, Atty, CPG, Tacoma*
- Katlyn Balsam, CPG, Tacoma
- Margaret Anderson, CPG, Bothell
- Jonathan Berliner, CPG, Lakebay
- Lara Berliner, CPG, Lakebay
- Heather Black, Atty, Bellevue
- Mindi Blanchard, M.Ed., CPG, Sequim*

Continued next page

Attendees, Con't

- Theresa Boyle, CPG, Gig Harbor
- Michelle Branstetter, CPG, Spanaway
- Steve Broom, CPG, Kelso
- Clare KC Brown, CPG, Maple Valley
- Judi Burkdoll, CPG, Vancouver
- Ingrid Cameron, CPG, Gig Harbor
- Brenda Carpenter, CPG, Sequim*
- Debra Christnacht, CPG, Lakewood
- James Christnacht, Atty, CPG, Lakewood
- April Coberly, CPG, Gig Harbor
- Leslie Cook, Bellingham
- Linda Custer, CPG, Puyallup
- Susan Daugherty—Guild, CPG, Bellevue
- Susan Dean, CPG, Sumner
- Karla Edwards, CPG, Des Moines
- T.L. Nicole Emmanuel, CPG, Spanaway
- Rene Ewalt, Atty, CPG, Oroville
- Michelle Ewert, CPG, Bellevue
- Ruben Foreman, CPG, Redmond
- Michael Gross, Ph.D., CPG, Kent
- Charlene Hamblen, CPG, Puyallup
- Cynthia Hanning, CPG, Edmonds
- Madelyn "Mimi" Hudson, CPG, Seattle
- Jaime Huff, Atty, Port Orchard
- Kirsti Hunziker, CPG, Yakima
- Stephanie Inslee, CPG, Bellingham
- Donald Johnson, CPG, Puyallup
- Sharon Johnson, CPG, Puyallup
- Tracy Johnson, CPG, Puyallup
- Elaine Judd, CPG, Humptulips
- Victoria Kesala, Atty, Vancouver
- Richard King, CPG, University Place
- Iris Kingston, CPG, Bellingham
- Dianne Klem, CPG, Lynnwood
- Deborah Lawrence, CPG, Puyallup
- Lecion Brogan, CPG, Vancouver
- Mack Lievense, Atty, CPG, Gig Harbor
- Giselle Loveland, CPG, Tacoma
- Arlene Mackey, CPG, Vancouver
- Ellen Magnuson, Vancouver
- Amby Matheny, CPG, University Place
- Susan Mattern, CPG, Tacoma
- Cindy Maxwell, CPG, Bellingham
- Patricia McIntosh, CPG, Silverdale
- Chris Medley, CPG, Tacoma
- Jenifer Mick, CPG, Seabeck
- Sarah Mills, CPG, Renton
- Elaine Morgan, CPG, Port Ludlow
- Peggy Mosshart, CPG, Union Gap
- Kirsten Murray, CPG, Poulsbo
- Linda Navage, CPG, Bainbridge Island
- Karen Newland, CPG, Lynnwood
- Chester "Chick" Newman, Seattle
- Jenny Nickl, CPG, Olympia*
- Kirsten Noble, CPG, Seattle
- Summer O'Neill, CPG, Longview
- Diane Pearson, CPG, Poulsbo
- Beth Peoples, CPG, Federal Way
- Marci Perkins, CPG, Waitsburg
- Sue Prichard, CPG, Poulsbo
- Frank Puschak, CPG, Spokane
- Tracy Raymond, CPG, Sumner
- Collette Rice, CPG, Puyallup
- Janene Robinson, CPG, Graham
- Robert Russell, CPG, Wenatchee
- Melissa Schafer, CPG, Seattle
- Laura Schmidt, CPG, Tacoma
- Michael Schmidt, CPG, Tacoma
- Joan Shoemaker, CPG, Colbert
- Carol Smith, CPG, Tracyton
- Sari Spieler, CPG, Freeland
- Janet Stein, CPG, Spokane
- Elizabeth Stone, CPG, Tacoma
- Julie Stone, Lay Guardian, Bainbridge Island
- Sherry Wamba, CPG, Everett
- Melissa Wilcox, CPG, Vancouver
- Albert "Doc" Williams, CPG, Spanaway
- Lorelee Williams, CPG, Spanaway
- Bernadine Wilson, CPG, Spokane Valley
- Paula Wind, CPG, Chehalis
- Amber Zabel, CPG, Vancouver
- Nicholas Zaharevich, CPG, Waitsburg
- Armelia Zaharevich, CPG, Waitsburg
- Richard Zittle, CPG, Tracyton

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:

_____ General Fund	_____ Educational programs for guardians
_____ Client ID# _____	_____ Scholarship fund for guardians
_____ Web Site	_____ Other _____
_____ Legal Fees associated with guardianship	_____
_____ 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



*Improving the Lives of
Vulnerable Adults*

5TH ANNUAL GUARDIANSHIP CONFERENCE SPOKANE

Tuesday & Wednesday
September 18 & 19, 2018



RED LION RIVER INN
700 N DIVISION ST
SPOKANE, WA 99202
PHONE: (509) 326-5577

CPG CREDITS APPROVED:
3 HOURS - ETHICS
3 HOURS - EMERGING ISSUES
11 HOURS - GENERAL
(4 BREAKOUT SESSIONS)

WSBA CREDITS REQUESTED:
2 HOURS - LEGAL & LAW
2 HOURS - ETHICS
(BALANCE TO BE DETERMINED BY WSBA)

DAY 1	TUESDAY, SEPTEMBER 18, 2018 (Six credit hours per day)
7:00 AM	BREAKFAST
7:45 AM	WELCOME & ANNOUNCEMENTS
TIME	PRESENTATION
8:00 AM	INCAPACITATED PERSONS AND THE CRIMINAL JUSTICE SYSTEM - Steve Graham This course will cover the different standard criminal courts use to weigh incapacity and incompetency to stand trial. We will cover suggestions for working with defense lawyers and other participants in the criminal justice system, and will cover possible ethical issues that may arise. We will cover the process from the time of an investigation or arrest through the trial and possible incarceration. CPG CREDIT: GENERAL; WSBA CREDIT: LAW & LEGAL (Pending)
9:00 AM	BREAK
9:15 AM	DIGITAL ASSETS & SUPPORTED DECISION-MAKING - Larry Weiser This presentation will cover the new law and issues of ownership and dealing with digital assets. Particularly, the discussion will revolve around problems surrogate decision makers and personal representatives of estates have with the administration of digital assets. It will also explore the difficult issues for health care decisions including end of life situations. CPG CREDIT: ETHICS; WSBA CREDIT: ETHICS (Pending)
10:30 AM	THE AMAZING, CHANGING BRAIN (COGNITIVE SKILLS AND THE AGING BRAIN: WHAT TO EXPECT) - RaMona Pinto Follow the journey of the brain as it ages. Gain a better understanding of how the brain ages and how it affects us. Scientific advances have brought forth a better understanding of how our brain functions; it can even grow new cells. Take a look at the brain from birth to death and discover that despite dementia and other neurobiological disorders associated with aging, the brain is moldable, pliable and repairable. Dementia is not inevitable and you can even get smarter as you get older. CPG CREDIT: GENERAL; WSBA CREDIT: (Pending)
10:30 AM BREAKOUT	IMMIGRATION 101 - Lisa Herrera This presentation will provide a general overview of the current state of immigration laws and policies in the United States, including a basic overview of our current immigration system, removal (deportation) proceedings and immigration detention. CPG CREDIT: GENERAL; WSBA CREDIT: (Pending)
11:30 AM	LUNCH
12:30 PM	THE BONDING PROCESS - Kim Edgar What the Underwriter looks for when underwriting a Guardianship Bond • Parameters for Restricting Assets How the Bonding Company monitors assets • Restriction of the Assets and Reduction of the Bond Amount may lower bond premiums CPG CREDIT: GENERAL; WSBA CREDIT: (Pending)
12:30 PM BREAKOUT	CULTURAL DIVERSITY & INTERPRETIVE ASSISTANCE - Lisa Herrera This presentation will cover how a person's cultural background and immigration status influences their interaction with the legal system, what rights immigrants have when they encounter immigration enforcement, and best practices for working with interpreters. CPG CREDIT: EMERGING ISSUES; WSBA CREDIT: (Pending)
1:30 PM	BREAK
1:45 PM	WHAT INFORMATION HELPS YOUR DOCTOR PROVIDE THE BEST MEDICAL CARE? - Jordan Storhaug, M.D. Find out what the doctor is considering during medical appointments and what you can do to maximize your visit. CPG CREDIT: GENERAL; WSBA CREDIT: (Pending)
1:45 PM BREAKOUT	7 QUESTIONS TO ASK YOUR FINANCIAL ADVISORY - FIDUCIARY ETHICS - Darryl Lynch State of Washington and NGA Standards of Practices • Responsibilities and Liabilities of a Fiduciary • Questions to ask your Financial Advisor • Ethical Decision Making • Roles of a Fiduciary • ABC's of Establishing a New Investment Account CPG CREDIT: ETHICS; WSBA CREDIT : (Pending)
2:45 PM	BREAK
3:00 PM	FIDUCIARY: EFFICIENCY, ACCURACY, AND ACCOUNTING - Charlene Hamblen & Chris Ayers Increase skills and knowledge in order to enhance quality of services provided to assigned clients/wards through efficient methods, organized recordkeeping, and concise reporting. CPG CREDIT: GENERAL; WSBA CREDIT: (Pending)
4:00 PM	ADJOURN

DAY 2 WEDNESDAY, SEPTEMBER 19, 2018 (Six credit hours per day)**7:00 AM BREAKFAST****7:45 AM WELCOME & ANNOUNCEMENTS****TIME PRESENTATION****8:00 AM NEW GUARDIANSHIP WAC - Dan Rees**

Learn about maximum guardianship fees and related cost deductions allowed from a client's participation or room and board on or after June 1, 2018. **CPG CREDIT: GENERAL; WSBA CREDIT: (Pending)**

9:00 AM BREAK**9:15 AM APPEARING IN COURT AND PETITIONING FOR INSTRUCTIONS -- Judge Kevin Naught**

Appearing in court can be intimidating. With an emphasis on Guardianship Program Rule 401 ("Guardian's Duty to Court"), this session is designed to give basic information on getting into court, preparing pleadings, making a proposal to a judge, conducting yourself while in court and on the record, and responding to the judge and others. **CPG CREDIT: ETHICS; WSBA CREDIT: (Pending)**

10:15 AM BREAK**10:30 AM MEDICARE UPDATE - Kim McKenn**

Attendees will learn about changes in Medicare effective in April 2018. New Medicare Card distribution, and changes in prescription drug plans, supplement plans, and anything on the horizon for 2019. **CPG CREDIT: GENERAL; WSBA CREDIT: (Pending)**

10:30 AM "I'M BEING HELD HOSTAGE BY MY BRA!": DECODING WHAT YOUR CLIENT MEANS - Mindi Blanchard**BREAKOUT**

This course will focus on how to determine what a client is really communicating by improving the guardian's ability to translate the incongruity of what the client says and how the client behaves. The course will discuss the possible meaning behind certain behaviors and how the guardian can use this information to help the client feel heard. **CPG CREDIT: EMERGING ISSUES; WSBA CREDIT: (Pending)**

11:30 AM LUNCH**12:30 PM DEVELOPMENTAL DISABILITIES TRUST - Tamara Roberts**

The DD Endowment Trust Fund, a supplemental needs trust program established in 1999, allows individuals with developmental disabilities, or their families, to set aside funds for future use without affecting their eligibility for government services and benefits, such as Supplemental Security Income (SSI) and Medicaid.

The DD Endowment Trust Fund is an easy and effective way to prepare for the future (and life's unexpected expenses) without risking financial eligibility for needed benefits and services.. **CPG CREDIT: GENERAL; WSBA CREDIT: (Pending)**

12:30 PM CULTURAL CONSIDERATIONS FOR END OF LIFE - Robin Johnson**BREAKOUT**

This course reviews dimensions of culture, which influence care in advanced disease. Assessment of culture is emphasized as essential to adequate communication and in providing culturally sensitive care. Culturally sensitive care includes recognition of multiple factors, i.e. ethnicity, gender, sexual orientation, spiritual beliefs and social class. Objectives: Identify dimensions of culture and the influence of culture on palliative care for patients across the life span. • Conduct a cultural and/or spiritual assessment of patients facing end of life. • Recognize the value of interdisciplinary care in respecting cultural and spiritual diversity. **CPG CREDIT: EMERGING ISSUES; WSBA CREDIT: (Pending)**

1:30 PM BREAK**1:45 PM A STORY OF RECOVERY: A JOURNEY CONTINUED - Steve Einhaus**

This presentation is about one man's struggle to overcome mental illness and piece together his life again. Not only has he recovered, he is living a successful life helping others overcome similar problems. He shares his story of hope to reiterate the messages, every life has meaning and no life is beyond redemption.. **CPG CREDIT: GENERAL; WSBA CREDIT: (Pending)**

2:45 PM BREAK**3:00 PM CPG BOARD UPDATES: NEW REGULATIONS AND NEW APPROACHES - Commissioner Rachelle Anderson**

Commissioner Anderson will update attendees on changes made this year to the regulations, new approaches to keeping lines of discussion open, and the new proposal for mediation as an alternative to investigations/discipline. **CPG CREDIT: GENERAL; WSBA CREDIT: (Pending)**

4:00 PM ADJOURN

QUESTIONS? CONTACT THE GUARDIAN INSTITUTE AT (360) 683-8334 OR EMAIL AT INFO@BRIDGEBLDRS.COM

ABOUT OUR SPEAKERS

STEVE GRAHAM leads a small law firm in Spokane that does almost exclusively criminal defense cases. Prior to starting his own firm, he served as the elected prosecuting attorney in Ferry County from 1998 to 2002. He also worked briefly as a deputy prosecutor in King County. Steve is a 1995 graduate of Gonzaga University School of Law. Steve has served as an instructor at the Reserve Police Academy, as a speaker at Eastern Washington University and at various CLE's. He is a frequent coach of high school mock trial teams. His firm has done pro bono work on the rights of Native Americans in Washington's Superior Courts and before the State Supreme Court.

PROFESSOR LARRY A. WEISER was on the faculty of Gonzaga Law School in the clinical law program since 1981. He retired in June, 2015. He was conferred the honor of Professor Emeritus of Gonzaga University in 2016. He was director of clinical law programs and was the director of the Elder Law Project and taught Elder Law, Alternative Dispute Resolution and Administrative Law. Professor Weiser has been certified as an Elder Law attorney (CELA) by the American Bar Association and National Academy of Elder Law Attorneys.

Professor Weiser is past chairman of the Administrative Law Section of the Washington State Bar Association and law school liaison and past treasurer of the Alternative Dispute Resolution Section of the Washington State Bar Association. He is a former board member of the Spokane Chapter of the Alzheimer's Association and past chair of the Dispute Resolution Center of Spokane and ADR section of the Spokane County Bar Association. He has mediated many cases over the past twenty-eight years and is a certified mediator with the Northwest Mediation Center.

In 2012 he received the Homan Award from the Washington State Bar Association, Administrative Law Section. The Frank Homan Award is given annually to an individual who has demonstrated contribution to the improvement or application of administrative law. He is currently a member of the Spokane County Superior Court Guardian ad Litem committee.

RAMONA M. PINTO, MS, CBIS has worked in the health care field for more than 20 years. She received her Bachelor of Science degree in Communications with an emphasis on Education and her Master's degree in Communications with an emphasis in Adult Learning Styles from Eastern Washington University. She also holds a degree in Gerontology and is a Certified Brain Injury Specialist. Ms. Pinto has taught in the field of health and recovery for Eastern Washington University, Community Colleges of Spokane, state wide businesses and agencies. She offers workshops, in-service training and keynote speaking to educate both practitioners and the public on the health, wellness and recovery resources available. Ms. Pinto has held a variety of positions, including but not limited to: Director of Apollo College, Senior Center Manager, and working for DSHS. Her personal experience with a TBI survivor motivates her desire to be deeply involved in bringing about an awareness of the silent epidemic, that of Traumatic Brain Injury. She is currently the Eastern Washington Resource Manager, where she works to prevent, support, educate and advocate for those who are involved with the TBI community..

KIM EDGAR Surety Underwriting for The Bar Plan since December of 2003. She manages the operations of The Bar Plan's court bond program and her responsibilities include underwriting, personnel, sales and marketing. Kimberly was instrumental in The Bar Plan's development of its Court Bond Program and has overseen expansion into all 50 states and D.C. Under Kim's leadership, sales growth has averaged 4.6% over the last 10 years and the program has achieved 8 consecutive years of profitability.

As a trained paralegal, Kimberly also serves as a Compliance Analyst for The Bar Plan Mutual Insurance Company. In that role, Kimberly assists the General Counsel with statutory and regulatory compliance and overseeing producer licensing.

JORDAN STORHAUG, MD is a family physician practicing in Spokane, WA. He started his career working at the Family Medicine Residency of Spokane first as a resident and then continued as a faculty member. This practice included serving many of the underserved in Spokane. He more recently moved his practice to the Providence North Pines clinic located in the Spokane Valley to spend more time directly working with patients. He continues to practice at the Maternity Clinic located at Sacred Heart Medical Center providing maternity care and supervising residents. He is currently serving as president of the Inland Northwest Academy of Family Physicians and eastside trustee to the Washington Academy of Family Physicians.

Dr. Storhaug received his bachelor's degrees from Washington State University and his Medical degree from University of Washington. He is a clinical instructor through the University of Washington School of Medicine.

CHARLENE HAMBLIN, CPG is the Executive Director of Share & Care House and the Chief Financial Officer of Precision Accountability. Charlene previously served as a bank Branch Manager, Operations Officer, and Loan Officer for a total of 17 years. During the past 26 years, Charlene has expanded Share & Care House from a single office with a few volunteers serving 45 Payee clients to an agency with four offices in Washington and Oregon, 33 staff and over 50 volunteers serving 2,000 Payee clients and 112 Guardianship clients, managing over \$3.4 million in state and federal grants to provide housing to 1,000 Washington homeless persons with disabilities annually, and is currently mentoring and assisting 35 service providers across the nation.

LISA HERRERA, staff attorney, Northwest Immigrant Rights Project, helps children and adults obtain immigration relief through Asylum, U and T Visas, and Special Immigrant Juvenile Status. Lisa emigrated from El Salvador at a young age and grew up with a passion for human rights because of her family's experiences. Lisa earned her J.D. from the University of Connecticut School of Law and has a B.A. from the University of Washington.

DARRYL LYNCH has worked with Guardians and Trustees throughout the years and holds an Accredited Investment Fiduciary (AIFO) designation awarded by the Center for Fiduciary Studies. He has recommended best practices for attorneys and guardians across the country and has maintained a 34+ year career in the financial services industry. His experience is unparalleled as he has been a member of the National Guardianship Association (NGA) since 2002 and currently sits on the Center for Guardianship Certification's (CGC) review board. Darryl has spent over 30 years at Oppenheimer & Co. Inc., where his experience and the firm's resources assist him in making knowledgeable recommendations and providing a high level of client service.

DAN REES received his bachelor's from Eastern Washington University in Business Administration with a Major in Economics and Finance 1987. Started with DSHS in 1991 with the Community Services Division as a Financial Services Specialist. Moved to Home and Community in 2003. He has been a lead worker at both agencies', a Fair Hearing Coordinator for HCS, a Supervisor at HCS, and currently the Financial Subject Matter Expert for Region 1.

JUDGE KEVIN NAUGHT is the current Criminal Presiding Judge for Yakima County Superior Court. Prior to being elected to this position by his fellow judges, Judge Naught was a general trial judge presiding over criminal, civil and domestic relations trials. He was previously a Court Commissioner for Yakima County Superior Court where he heard guardianship, probate, domestic relations, unlawful detainer, domestic violence, ex parte and probable cause matters on a regular basis. Prior to coming to the bench, he was in private practice for 14 years with an emphasis on family law, estate planning, probate and real estate. He was a RCW Title 11 Guardian ad Litem and the Superior Court appointed him as legal counsel for Alleged Incapacitated Persons. Judge Naught served as a U.S. Army Judge Advocate for over three years during which time he prosecuted crimes on behalf of the Army and was deployed to Bosnia as part of NATO's response to the Balkan War. He is a current member of the Yakima post of the Veterans of Foreign Wars. He graduated from Washington State University (cum laude) and then Gonzaga University School of Law (cum laude) where he was an associate editor for the Gonzaga Law Review. When he is not at work or camping in the mountains, Judge Naught and his wife travel the Pacific Northwest in support of their three children who play on three different soccer teams.

CHERYL KINGEN received her Juris Doctorate from Gonzaga University School of Law in 1976 and retired as a Staff Attorney for the United States District Court for the District of Eastern Washington after 30 years of practice. Following her law career, Cheryl served as an adjunct professor of law at Gonzaga University School of Law for two years. She has been with SHIBA for three years and is a counselor for those needing assistance with their Medicare coverage and maintains the SHIBA program in Spokane, Asotin, Whitman and Garfield counties.

TAMARA ROBERTS is currently the Trust Manager at The Arc of Washington State, which is the Trust Manager for The Washington State Developmental Disabilities Endowment Trust Fund. Tamara has worked on the trust fund program for over nine years assisting individuals and families in all areas of the trust program. She also travels around the State to speak about the benefits of the program. Tamara lives in Olympia, WA with her husband and two children.

STEVE EINHAUS has a BA in Economics from Eastern Washington University and currently works as a Peer Specialist at Eastern State Hospital in Medical Lake, Washington. Steve was diagnosed with schizophrenia at 20 years old. He has lived almost half my life with a major mental illness. Steve wants to show that he is not the monster society at large may fear, but rather has a brain disorder that "goofs him up" on occasion. He takes his medications religiously and has recovered, as do any individuals with mental illness folks. A snapshot of Steve before his first mental health crisis is immaterial. In the past 18 years he has been named the Washington State Behavioral Health Conference Employee of the Year for his work as a Peer Specialist, published a first person account in the American Psychiatric Association Journal of Psychiatry, and given numerous talks in Spokane on his story of recovery. Steve credits faith in Jesus Christ as the lynchpin to his ongoing success.

COMMISSIONER RACHELLE ANDERSON, Superior Court was appointed to the court in 2010. Prior to that she was an Administrative Law Judge for the Washington State Office of Administrative Hearings following 13 years in private practice, emphasizing Family Law and Juvenile Dependency work. Ms. Anderson received her undergraduate degree from Eastern Washington University and her Juris Doctorate from Gonzaga University School of Law.

MINDI BLANCHARD, M.ED, CPG has a long history of working with seniors and persons with disabilities. She married in 1980. Her husband had Multiple Sclerosis. Mindi was his primary caregiver and advocate for him as he was bedridden for almost half of their 10-year marriage. The last 22 months of his life, Mindi had to make the gut wrenching decision to have him in a nursing home.

After her husband's death in 1991, Mindi received her bachelor's degree in Health Education and, later, master's degree in Education with an emphasis in guidance and counseling. She completed one of her two internships with Bridge Ministries for Disability Concerns. She also volunteered at a camp for families with disabled family members for 7 years. She participated as a volunteer for 5 years and as volunteer coordinator and trainer for 2 years.

ROBIN JOHNSON, RN, CHPN, has worked in the medical field for nearly 40 years. She spent her first 20 years as a Tumor Registrar and Clinical Trials Coordinator at Providence Holy Family Hospital, where she organized tumor boards and cancer committees, sat on the End-of-Life committee, and chaired the Oncology Unit Base Counsel meetings. During this time, Robin briefly moved to Cancer Care Northwest, where she spent 3 years as a Research Nurse. This experience gave Robin the foundation to return to Providence Holy Family Hospital as a Certified Oncology Nurse for the next 12 years, which then led her to Providence Sacred Heart as the Cancer Patient Navigator. In 2013, Robin found her calling at Hospice of Spokane, where she has utilized her talents as a Case Managing Nurse, a Hospice House Nurse (certified in Hospice & Palliative Care), and to her present position as a Clinical Outreach Coordinator, where she is able to share her wealth of knowledge with our clients, our community and other medical providers in this dynamic field.



5TH ANNUAL GUARDIANSHIP CONFERENCE SPOKANE

Administered by: Bridge Builders, Ltd

Tuesday & Wednesday | September 18 & 19, 2018

REGISTRATION FEE: \$400.00.

This includes a hot breakfast and lunch each day.

INDIVIDUAL SESSIONS: \$50.00 per credit hour.

(Minimum 2 hours each day.)

Payment must be received on or before September 1, 2018.

Starting September 2, 2018, the registration fee increases to \$500.00.

Name: _____

Business: _____

Address: _____

City: _____ State: _____

Zip: _____ Phone: _____

Email: _____

CPG# _____ WSBA# _____

ATTENDANCE

_____ **Full 2-day conference**

Dietary Accommodations: Vegetarian/Vegan___ Gluten Free___

Other _____

_____ **Individual sessions**

of CPG Credits _____ # of WSBA Credits _____

(please write the sessions chosen on a separate page)

HANDOUTS

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

_____ Binder/paper course book

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 August 1, 2018 or all of the scholarships are awarded. Fax the registration and scholarship applications to (360) 683-8358 or email to info@bridgebldrs.com.

Name _____

Address _____

City _____ State _____ Zip _____

Phone _____ Email _____

County _____ CPG (CPG# _____)

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 September 1, 2018.

CONFERENCE PARKING IS FREE.

LODGING

The Red Lion River Inn has a conference rate of \$129.00 per night.

Call: 509-326-5577 **Tell them you are with the GUARDIAN INSTITUTE.**

Reservations must be made by August 19, 2018 to receive this rate.

Contact us at info@bridgebldrs.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:

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