



The Guardian Institute

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

January 2019
Volume 6, Issue 1

HAPPY NEW YEAR!

The Guardian Institute has some exciting goals for this new year. We have recently hired Sefla Fuhrman, Ph.D to help us achieve these goals. We will continue to:

- **Provide continuing education conferences** twice a year.
- **Work to expand our Volunteer Guardian Advocate Program.** Our first volunteer is being appointed to a guardianship this month!
- **Continue to offer Mini-Grants** for low-income guardianship clients as funds allow.
- **Launch our Guardian Institute website***. I know I keep saying this but it really will launch this month or next month.
- **Continue to provide community presentations** to educate the public about guardianship.

Conference Registration Fees

For the first time in over ten (10) years we are raising the price of the conference registration to \$425.00. We had hoped that having vendors and sponsors would help us avoid raising the fees but the cost of providing the conference is increasing faster than we can grow our vendor/sponsor following. We are still offering five (5) \$200.00 scholarships at each conference. If you would like an application, email info@bridgebldrs.com or call (360) 683-8334.

A conference Registration form is at the end of this newsletter.

*Looking for the Guardian Profiles? They will be on our website!



INSIDE THIS ISSUE

Volunteers Needed2
 Help Wanted2
 Income & Expenses.....2
 Mini-grants3
 Continuing Education4
 Thanks to our Contributors ..5
 Ways You can Help..... 7
 Donation Form..... 8
Conference Registration..9

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

LOOKING FOR VOLUNTEER GUARDIAN ADVOCATES IN CLALLAM COUNTY

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

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.

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
- Support our website
- Legal fees for low income clients
- Education scholarships lay or professional guardians
- You designate

ASSISTANCE RECIPIENTS

*Client A0004—Skagit County *Mini-grant awarded: \$2,400.00 Amount Expended: \$1,487.50*

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 and has been paying for job coaching. The guardian has applied for continued funding for 2019.

Client A00006– Clallam County Mini-grant awarded: \$300.00 Amount Expended: \$278.28

Client A00006 and his wife had a severe bedbug infestation in their home requiring them to spend two weeks at a motel. The caregiver managed to find funding for the motel stay and to replace most of the furniture but needed additional funds for bed. The Guardian Institute approved a \$300.00 grant for the purchase of new beds for the client and his wife, who are now happily ensconced back in their home.

Client A00007– Pierce County Mini-grant awarded: \$650.00 Amount Expended: \$525.00

A few months ago a guardian in Clallam County was contacted by a case worker who needed to place a client in Pierce County but the receiving facility required someone with legal authority (not the client) to sign the documents. A power of attorney was needed or a guardianship would need to be petitioned, the result of which would mean that the placement would not hold the bed. A power or attorney in Clallam County for someone located in pierce county didn't make sense, so the guardian contacted a guardian in Pierce County who agreed to be alternate power of attorney. The Clallam County power of attorney signed the admission papers and then resigned, allowing the Pierce County power of attorney to take over. Because the client is on Medicaid, the power of attorney would not be paid and made an application to the Guardian Institute asking for a nominal monthly payment of \$75.00 per month. The Guardian Institute supposed guardians who are willing to be power of attorney for low-income clients and approved the request.

** The guardian for Client A0004 has applied, and been awarded, funds for 2019 to continue 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, feel free to send a check to the Guardian Institute, PO Box 610, Sequim, WA 98382. The Guardian Institute also accepts VISA and MasterCard. Call 360-683-8334 and a staff person will take the information.

DONATIONS ARE TAX DEDUCTIBLE

CONTINUING EDUCATION

Guardian Institute Spring Conference—Bremerton (open to all who are interested)

Tuesday & Wednesday, March 19 & 20, 2019

The two-day conference registration: \$425.00 (includes hot breakfast & lunch)

Individual sessions: \$50.00 per session (minimum of two sessions)

Interested in being an exhibitor? Email info@bridgebldrs.com and put “2019 Conference” in the subject line.

The following are confirmed speakers/Topics:

Gary Beagle, CPG—WAPG Update

Angela Bucholtz—Guardian Bookkeeping

Mindi Blanchard, CPG—Listening and Communication Skills to Advocate for and Negotiate with Clients

Maureen Carroll—How to Communicate Effectively with Mental Health Professionals

Maureen Carroll—Serving Clients with Developmental Disabilities: Balancing the unique difficulties of balancing rights of clients vs responsibility to court/client

Kim Edgar—Risk Management Tips for Guardians

Patrick Erker—Disciplinary Action and the Certified Professional Guardian: The What’s, How’s and Why’s

Charlene Hamblin, CPG—Ins and outs of the Social Security Representative Payee Services

Ian Horlor, DSHS—Guardianship Fees and How to Properly Apply for an ETR

Ian Horlor, DSHS—Questions & Answers

Judge Hull, Kitsap County Superior Court—A View from the Bench

John Lee—Eldercare Financial Abuse

Darryl Lynch—ABLE Accounts vs Special Needs Accounts

Amby Matheny, Marty Whitman & Kathy Kathleen Figetakis—Use of Care Management by Guardians and Fiduciaries

Phil Miller—Reverse Mortgage Funding

Robert B. Nettleton, Harlow & Fault, LLP—Uniform Guardianship Act

Taffi Wheeldon—Solutions for Homelessness

National Conference on Guardianship

October 12-15, 2019

Venue: Griffin Gate Marriott, Lexington, Kentucky

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, Bremerton



TrueLink Financial—California

Registration Sponsor, Spokane



CarePatrol of Spokane

Program Sponsor



Liberty Lake

Exhibitors

Exact GPS, Charlene Hamblin, Puyallup (Bremerton & Spokane)
File Center, Lucion.com—Utah (Bremerton)
Purple Cross, Dave Martin, Tacoma (Bremerton & Spokane)
Sunshine Health Facilities, 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 Walking Memorial Trust (Clallam County)

Volunteer Hours for 2018: 143.15

Partial CPG Scholarships awarded for 2018: 10

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, Winger, 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

*Supporting through Conference Attendance (*means also a speaker)*

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

Continued next page

Attendees, Con't

- Margaret Anderson, CPG, Bothell
- Rebecca Bailey, LICSW, CPG, Covington
- Robin Balsam, Atty, CPG, Tacoma*
- Katlyn Balsam, CPG, Tacoma
- Jonathan Berliner, CPG, Lakebay
- Lara Berliner, CPG, Lakebay
- David Beseler, CPG, Spokane
- Heather Black, Atty, Bellevue
- Mindi Blanchard, M.Ed., CPG, Sequim*
- Cathy Bly, CPG, Walla Walla
- Theresa Boyle, CPG, Gig Harbor
- Michelle Branstetter, CPG, Spanaway
- Lecion Brogan, CPG, Vancouver
- Steve Broom, CPG, Kelso
- Clare KC Brown, CPG, Maple Valley
- Peggy Bureta, CPG, Spokane
- Judi Burkdoll, CPG, Vancouver
- Paul Calabro, Atty, CPG, Spokane
- Krystian Calhoun, CPG, Yakima
- Ingrid Cameron, CPG, Gig Harbor
- Brenda Carpenter, CPG, Sequim*
- Debra Christnacht, CPG, Lakewood
- James Christnacht, Atty, CPG, Lakewood
- Lynda Clark, CPG, Spokane
- April Coberly, CPG, Gig Harbor
- Leslie Cook, CPG, Bellingham
- Winston Cook, Atty, CPG, Medical Lake
- Kathrine Cooley, CPG, Spokane
- Linda Custer, CPG, Puyallup
- Susan Daugherty—Guild, CPG, Bellevue
- Susan Dean, CPG, Sumner
- Sally Denten, CPG, Post Falls, ID
- Steven Depner, CPG, Spokane
- Karla Edwards, CPG, Des Moines
- Kristen Eickstadt, CPG, Spokane
- T.L. Nicole Emmanuel, CPG, Spanaway
- Coya Eubank-Kirby, CPG, Redmond
- Rene Ewalt, Atty, CPG, Oroville
- Michelle Ewert, CPG, Bellevue
- Anita Farr, CPG, Colfax
- Ruben Foreman, CPG, Redmond
- Dale Frederickson, CPG, Spokane
- Nancy Frederickson, CPG, Spokane
- Geniece Gregory, CPG, Sammamish
- Michael Gross, Ph.D., CPG, Kent
- Josh Guthmueller, CPG, Spokane
- Charlene Hamblen, CPG, Puyallup
- Cynthia Hanning, CPG, Edmonds
- Ronda Hill, CPG, Vancouver
- Madelyn "Mimi" Hudson, CPG, Seattle
- Jaime Huff, Atty, Port Orchard
- Kirsti Hunziker, CPG, Yakima
- Stephanie Inslee, CPG, Bellingham
- Dawna James, CPG, Waitsburg
- Donald Johnson, CPG, Puyallup
- Sharon Johnson, CPG, Puyallup
- Tracy Johnson, CPG, Puyallup
- Elaine Judd, CPG, Humptulips
- David Keene, CPG, Lewiston, ID
- Victoria Kesala, Atty, Vancouver* (Bremerton & Spokane)
- Richard King, CPG, University Place
- Iris Kingston, CPG, Bellingham
- Grace Kittredge, CPG, Spokane
- Dianne Klem, CPG, Lynnwood
- Deborah Lawrence, CPG, Puyallup
- Mack Lievense, Atty, CPG, Gig Harbor
- Giselle Loveland, CPG, Tacoma
- Arlene Mackey, CPG, Vancouver
- Ellen Magnuson, Vancouver
- Amby Matheny, CPG, University Place
- Ramona Mather, CPG, Reardon
- Susan Mattern, CPG, Tacoma
- Cindy Maxwell, CPG, Bellingham
- Patricia McIntosh, CPG, Silverdale
- Joseph McKinnon, CPG, Spokane
- Chris Medley, CPG, Tacoma
- Jenifer Mick, CPG, Seabeck
- Sarah Mills, CPG, Renton
- Kelly Moore, CPG, Spokane
- Katrina Morales, CPG, College Place
- 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 (Bremerton & Spokane)
- Tracy Raymond, CPG, Sumner
- Collette Rice, CPG, Puyallup
- Judith Robertson, CPG, Spokane
- Jacque Robeson, CPG, Asotin
- Robert Robeson, CPG, Asotin
- Janene Robinson, CPG, Graham
- Robert Russell, CPG, Wenatchee
- Laura Ryan, CPG, Medical Lake
- Melissa Schafer, CPG, Seattle
- Laura Schmidt, CPG, Tacoma
- Michael Schmidt, CPG, Tacoma
- Carrie Shirk, CPG, Wenatchee
- Joan Shoemaker, CPG, Colbert
- Thea Skomo, CPG, Spokane
- Carol Smith, CPG, Tracyton
- Sari Spieler, CPG, Freeland
- James Spurgetis, atty, CPG, Spokane
- Janet Stein, CPG, Spokane (Bremerton & Spokane)
- Elizabeth Stone, CPG, Tacoma
- Julie Stone, Lay Guardian, Bainbridge Island
- Pauline Trefren, CPG, LaCenter
- Jodi Wallace, CPG, Bham
- 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
- Amanda Witthauer, CPG, Veradale
- Cheryl Wood, CPG, Spokane
- Jana Worthington, atty, CPG, Spokane
- 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:

- | | |
|--|---|
| <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

Guardian Institute 2019 Conference

Registration fee: \$425.00. This includes a hot breakfast and lunch each day. Payment must be received **on or before March 6, 2019**. Starting March 7, 2019, the registration fee increases to \$525.00. Individual sessions are \$50.00 for each credit hour; minimum 2-hours.

Fax to: (360) 683-8358; mail to Guardian Institute, PO Box 610, Sequim, WA 98382.

Name: _____

Address: _____

City: _____ State: _____

Zip: _____ Phone: _____

Email: _____

CPG# _____ WSBA# _____

Handouts are provided on a USB memory stick. If you would prefer a binder the cost is \$25.00 Please check:

_____ Binder/paper coursebook

_____ Full 2-day conference

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

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: _____

Parking and Accommodations: Parking is \$7.00 per day

The Hampton Inn & Suites (360) 405-0200 has a conference rate of \$135.00 per night. If you call, mention that you are with the Guardian Institute conference. Register online, copy and paste the following URL:

<http://group.hamptoninn.com/GuardianInstitute>. **Reservations must be made by February 20, 2019** 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 post-marked or faxed to us by 5:00 PM Wednesday, March 13, 2019.

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