



## 2020 Winter Conference Agenda

- 8:15 am - 8:50 am**                      **Registration and Reception**
- 8:50 am - 9:00 am**                      **Welcome**  
Gary Beagle, In Trustment Northwest  
Status of the UGA – how we got here and what to expect in 2020
- 9:00 am - 10:00 am**                      *Mark Vohr, Ohana Fiduciary Corp.*  
*Darryl Lynch, Oppenheimer Co Inc*
- Now that we're called Conservators what will change?
  - When is a Conservatorship needed and what are their duties?
  - What powers do not need court approval?
  - Conservator's plan, report and accounting
  - Protective arrangements
  - Terms and conditions for bonds
  - Sale of real property
  - Investment Accounts
- 10:00 am - 11:00 am**                      *Suzanne Thompson Winger, CTW Law Firm/CTW Caring Solutions*
- Guardian (no longer called guardian of person) – are there changes to duties?
  - What are the special limitations on guardian's power?
  - When does guardian apply for and receive funds/benefits?
  - What is a temporary guardian and an emergency guardian?
  - Guardian's plan and report
  - Substitute Decision Making
  - Notice of order of appointment and rights
- 11:00 am - 11:15 am**                      **Break**

**11:15 am - 12:15 pm**

*Tuohy Minor Kruse PLLC, and Amy Spitzer, Fox Ballard PLLC*

Mechanics of the new act:

- Notice requirements
- Roles of the players
- Visitors
- Family members
- Petitioners
- Appointment and role of attorney
- Forms
- Compensation

**12:15 pm - 12:5 pm**

**Lunch**

**12:45 pm - 1:45 pm**

*Eric Brunstrom, Aiken, St. Louis & Siljeg, P.S.*

More mechanics of the new act:

- Trusts and gifting for Medicaid purposes
- Termination, modification and transfer of guardianship or conservatorship
- Resignation of guardian or conservator
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- Responsibilities after death of client
- Starting a probate

**2:00 pm - 2:30 pm**

*Court Commissioner*

- Bench Perspective – how is the Court affected?

**2:30 pm - 2:45 pm**

**Break**

**2:45 pm - 3:45 pm**

*Richard Furman and David Hansen, Aiken, St. Louis & Siljeg, P.S.*

- Grievances, complaints and removal of guardian

**3:45 pm - 4:15 pm**

*Panel*

- What are your questions for the speakers?

*Best wishes for a successful 2020 from  
YOUR professional home!*

