

## Agenda - Teleconference

Friday June 8, 2018

1. Roll Call

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2. Review of Minutes from April and May Meetings
3. Review of Financials– if available
4. Committee Reports

Seat 1. National Conferences.

Chair: Wendy Powell

Members: Jennifer Brumley

Seat 2. October CLE.

Chair: Renee Karel

Members: Regan Charlton, Sarah Mello

Seat 3. Other CLEs.

Chair: Merritt Dublin

Members: Sarah Mello, Regan Charlton

Seat 4. Legislative Update.

Chair: Mackenzie Whatcott

Members: Kimberli Stretch, Doug Leavitt

Seat 5. Publications.

Chair: Fred Zundel

Members: Mackenzie Whatcott, Jennifer Schindele

Update on ADVOCATE ARTICLES – JUNE/JULY 2018

Seat 6. Technology.

Chair: Doug Leavitt

Members: Renee Karel (monitor List Serve)

Seat 7. District Support.

Chair: Sarah Mello

Members: Jen Brumley

Seat 8. Resources.

Chair: Sarah Mello

Members: Fred Zundel, Kimberli Stretch, Merritt Dublin

Seat 9. Special Projects and Awards/Family Law Award of Distinction.

Chair: Jennifer Schindele

Members: Doug Leavitt, Mackenzie Whatcott, Sarah Mello

Seat 10. Community Service.

Chair: Jennifer Schindele

Members: Regan Charlton, Doug Leavitt

5. Old Business

October CLE – Update on CLE topics and progress

6. New Business

Vacancy created by Merritt Dublin leaving the council. We need to fill the remainder of her term. We can put out an email for nominations OR vote on it at this meeting on the spot if someone wants to volunteer.

Opportunity to get some free CLE's in the Child Protection area. Dates can be posted to our page to inform our members.

Guardian & Conservator Training & Sponsorship Opportunities. See handouts. Should we post this information for our members.

## Wendy M. Powell

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**From:** Jaime Hansen <jaime@familyadvocates.org>  
**Sent:** Thursday, May 17, 2018 4:00 PM  
**To:** wendy@wmpowell-lawpllc.com  
**Cc:** Darci Anderson  
**Subject:** FW: CP CLE Flyer  
**Attachments:** 2018-07-09 CP CLE Flyer.pdf

Wendy,

Good afternoon! I received your contact information from Mahmood Sheikh at the Bar and wondered if the Family Law section that you chair would be interested in the free CLE that we are sponsoring with Judge Andrew Ellis. It is a monthly offering that outlines the Child Protection system. Would you be willing to share the attached flyer with your listserv? I plan on having a flyer out every month but, if the section would like to mark their calendars in advance, the dates will be:

1. July 9 (attached flyer)
2. Aug 20
3. Sept 17
4. Oct 15
5. Nov 19
6. Dec 17
7. January 28
8. February 25
9. March 18
10. April 15
11. May 20
12. June 17

All sessions will be held on the 4<sup>th</sup> floor of the building that houses Alavita and, hopefully, we will have technology to live stream the session. If you would like more information, please contact me at the number below or via email. Have a wonderful rest of your week!

Jaime

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### **Jaime Hansen, Executive Director**

Family Advocates  
3010 W State St, Boise, ID 83703  
Phone: 208-345-3344 x1002

Check out our new website! [www.familyadvocates.org](http://www.familyadvocates.org)

\*\*\*Please note my new email address\*\*\*

**Consider a monthly investment in the children and families we serve.**





## NGA FUNDAMENTALS OF GUARDIANSHIP WORKSHOPS Ethical Principles & Standards of Practice

These webinars are geared toward all (family and professional) guardians and conservators who are newer to their responsibilities and those wanting a refresher. We will be reviewing the NGA Ethical Principles and the Standards of Practice that elaborate on those principles, as well as the Fundamentals of Guardianship. We will be using the recorded webinars from the National Guardianship Association; discussions will be facilitated by experienced local guardians and conservators.

### THE BASICS – June 14<sup>th</sup>

The Basics module focuses on preliminary guardianship information, decisional capacity, incapacity, types of guardianships and guardianship process.

### GUARDIAN OF THE PERSON – July 12<sup>th</sup>

This module identifies the phases of guardianship, lists the initial duties of the guardian, describes the ongoing duties of the guardian, explains the importance of confidentiality, and discusses guardianship transition.

### GUARDIAN OF THE ESTATE (CONSERVATOR) – August 2<sup>nd</sup>

This module explains fundamental fiduciary principles, lists and explains the responsibilities and duties of the guardian of the estate, defines prudent investment principles and describes the possible indicators of exploitation. In addition, it will detail conflicts of interest and the termination of guardianship.

### RIGHTS AND ALTERNATIVES – August 23<sup>rd</sup>

This module discusses the rights of persons under guardianship, the importance of protecting and advocating for the persons under guardianship rights, alternatives to guardianship and when they should and should not be used and alternative ways to handle issues related to finances or health.

### Continuing Education Credit

This webinar has been approved by the Center for Guardianship Certification for 1.0 credit.



### WORKSHOP LOCATION

Edgewood Spring Creek  
175 E. Calderwood Drive  
Meridian, ID 83642

### 2018 WORKSHOP DATES

Thursday, June 14<sup>th</sup>

Thursday, July 12<sup>th</sup>

Thursday, August 2<sup>nd</sup>

Thursday, August 23<sup>rd</sup>

### WORKSHOP TIME

4:00PM- 6:30PM

### FEES PER WORKSHOP

\$5 each for members

\$10 each for non-members

*For CEU certification \$10 per course*

### MEMBERSHIPS

Family G & C's \$10  
Annually

### IDAHO GUARDIAN AND FIDUCIARY ASSOCIATION

### TO REGISTER GO TO:

[www.idahoguardianship.org](http://www.idahoguardianship.org)  
[info@idahoguardianship.org](mailto:info@idahoguardianship.org)





## SPONSORSHIP OPPORTUNITIES

FOR THE 2018 IGFA 4-PART NGA  
FUNDAMENTALS TRAINING

Idaho Guardian and Fiduciary Association  
PO BOX 6599  
Boise, ID 83707  
[www.idahoguardianship.org](http://www.idahoguardianship.org)  
[info@idahoguardianship.org](mailto:info@idahoguardianship.org)

### NATIONAL GUARDIANSHIP ASSOCIATION FUNDAMENTALS OF GUARDIANSHIP WORKSHOPS

These webinars are geared toward all (family and professional) guardians and conservators who are newer to their responsibilities and those wanting a refresher. We will be reviewing the NGA Ethical Principles and the Standards of Practice that elaborate on those principles, as well as the Fundamentals of Guardianship. We will be using the recorded webinars from the National Guardianship Association; experienced local guardians and conservators will facilitate discussions.

#### TRAINING WORKSHOP SPONSORSHIP

One \$400/\$300 Sponsor per Workshop  
– OR –  
\$900 for all 4 Workshops

- \$400 sponsorship includes an IGFA business membership for 2018 (\$125 value)
- Company banner at front of room
- 5-minute business introduction
- Web link on IGFA website for 3 months per sponsorship
- Logo on all training and marketing material
- Summary of business with training materials
- Table to showcase business
- Option to provide small gift with logo



#### FACILITY SPONSOR

Room, TV, Tables & Chairs

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- 5-minute business introduction
- Web link on IGFA website for 3 months
- Logo on all training and marketing material
- Marketing information
- Option to provide small gift with logo

#### FOOD & BEVERAGE SPONSOR

Two \$100 Sponsors per Workshop

- Logo on training materials
- Thank you to plaque on food tables
- Brochure/marketing piece
- Option to provide small gift with logo

IF YOU ARE INTERESTED IN BECOMING A SPONSOR  
OF ONE OR MORE OF THESE IMPORTANT WORKSHOPS,  
PLEASE GO TO [WWW.IDAHOGUARDIANSHIP.ORG](http://WWW.IDAHOGUARDIANSHIP.ORG)