

Fall 2012

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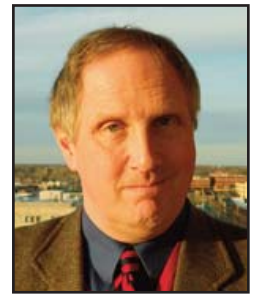
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Message from the President

Even though as I write this it is early September, I realize “my” year as President of the Center for Guardianship Certification is rapidly drawing to a close. This is my last *Message from the President*... and this is the last *CGC Connection e-newsletter* (more about that later.)



Fred Floreth, NMG

On the occasion of my last column, I invite you—as physicists do when they try to explain the Theories of Relativity—to engage in a thought experiment. If you were starting from scratch, how would you design a nationwide system for certifying non-family guardians?

Keep in mind, unlike lawyers or Certified Financial Planners, a guardian’s clients may have little or no capacity to object if the certified guardian misbehaves. In addition, recall you—as the architect of a certification system for guardians across the entire county—have to consider the laws of fifty different states.

Oh, yes. The system you establish will have no government funding, subsisting solely on the fees paid by certificants, who—in general—are operating either through local or state governments, as an employee of/a volunteer for a not-for-profit organization or as a private practitioner working with a tight profit margin.

Not so easy, is it? Although CGC has had its ups and downs—and we know our procedures are far from perfect (that’s why we continually try to improve them)—I am very proud of the job done by our all-volunteer Board of Trustees and by CGC’s staff.

As an example of striving to improve, the CGC Board will be considering possible changes to our present procedure of third-party verification. Since the time many of you originally certified, the CGC has strengthened its processes, making becoming certified or maintaining certification more rigorous. As always, these stricter measures are to further our ongoing mission of protecting persons under guardianship. In part, however, our new procedures are also in response to a report on guardianship in the United States by the federal General Accounting Office (GAO). As part of their investigation, the GAO had two undercover applicants obtain National Certified Guardian status by fraudulent means.

To prevent the possibility of such an occurrence in the future, the CGC adopted a policy of third-part verification. All applicants and certificants—upon their first

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reapplication since the new rules have been instituted—are required to have either their work experience OR their educational credentials verified by a third party. This is to prevent an applicant from becoming re-certified by submitting fake documents.

Applicants who do not have as yet any work experience as a guardian must have their educational background verified by a third party. The CGC is looking for a third party to verify such an applicant has a degree, certification or license in a field related to guardianship.

You may be interested to know even I, the current CGC President, had to go through these procedures, as my current certification as a National Master Guardian expired at the end of October. I had to either have someone certify my work experience as a guardian or have my law school submit proof of my law degree. I asked a local judge to certify I have been practicing as the Montgomery County, Illinois, Public Guardian for the past 27 years!

Members of the Board of Directors and of our National Certified Guardian and National Master Guardian committees are constantly contemplating changes to the CGC's *Rules and Regulations* to streamline the re-certification process to make it easier for you, while still meeting our goal of protecting persons under guardianship. I invite you to become an even more active part of national guardianship certification by volunteering to serve on a CGC committee or applying to become a member of our Board of Directors.

Now, as to this being the last *CGC Connection e-newsletter*: Despite the Board's best efforts, CGC continues to operate at a deficit (and, unlike the federal government, we aren't allowed to print money!) Therefore, as part of our 2013 budget discussions, the prospect of eliminating this newsletter to cut costs was seriously considered and it was decided to do just that. This is the last newsletter you will receive from CGC.

I have mixed feelings on the subject. The CGC will still be able to communicate with you via "e-blasts." Those of you on Facebook (I'm not) are able to get the latest CGC news on Mark Zuckerberg's creation. The National Guardianship Association has always allowed CGC to present articles in the NGA's *The National Guardian*.

In any event, it has been an honor to serve as the President of the Center for Guardianship Certification. I am humbled when I consider all the great work being done by you—the National Certified Guardians and the National Master Guardians —on behalf of persons under guardianship. Thank you!

Fred Floreth, NMG
President, Center for Guardianship Certification

*CGC's Booth at the
NGA Conference*



CGC Announces 2013 President Vicki Alkire, NMG

Vicki V. Alkire, CPHQ, LHCRM, NMG, CMC, is the President and owner of Viable Alternatives, Inc., a care management organization which also offers guardianship services. She graduated from Alderson-Broaddus College in West Virginia with a degree in psychology and sociology with an emphasis in social work.

After moving to Sarasota in 1983, Vicki was the Director of Patient Services at South Bay Hospital in Sun City Center, Florida. There she was responsible for several functions including discharge planning, the patient advocate program, quality improvement and risk management.

Vicki still maintains certification as a certified professional in health care quality and licensure as health care risk manager. In 1999, Vicki obtained certification as a *National Master Guardian*. She is one of 63 individuals nationwide holding this advanced



Vicki V. Alkire, NMG

designation. An advocate of education, Vicki obtained certification as a Certified Care Manager in long-term care management.

Vicki has been involved as a leader on the National Guardianship Association (NGA) Board of Directors, on the Florida State Guardianship Association (FSGA) Board where she also held the office of Treasurer, working diligently to bring the Association's fiscal records up to acceptable accounting standards.

Vicki has worked on FSGA, NGA and CGC Bylaws and policies. She has chaired the CGC committee for the National Certified Guardian examination and served as President-Elect of CGC in 2011. Vicki received

the NMG Star Achievement Award in 2008.

Please join us in congratulating Vicki as she begins her term as CGC President.

CGC is on Facebook!

Social media use is a great way to increase an organization's online presence. It's also a useful tool to stay connected with others in the industry. CGC wants our certified guardians to benefit from this opportunity to connect with other certified guardians and to stay updated on CGC news and events.

[Click here](#) to view CGC's page. If your business has a Facebook page, "like" us so we can "like" your page, too!

facebook

Have you moved?



Please contact the CGC office with your new address, phone and/or email so your NCG/NMG status doesn't lapse.

If CGC does not have your current contact information, we are unable to notify you with reminders about your re-certification status and you may have to begin the certification process all over again. We want to make sure you do not have to do that, so please keep us informed of your contact information!

Email any changes in your contact information to Lesley at certification@guardianshipcert.org.

Jean Krahn, NMG, Thanked for Board Service

During Jean's presidency, CGC made numerous changes to its system and procedures. Some of these decisions were not easy and were discussed for hours with various committees and at the Board level. Jean was a model of leadership and ensured everyone had a voice and a vote during the process.

During Jean's tenure, it was decided that CGC would begin requiring applicants to take examinations at testing sites. It was also decided that CGC would run criminal background checks on every applicant. The Board decided those seeking recertification through CGC would have to undergo a criminal background check every other recertification period. It was decided that the applicants' social security numbers would be verified



M. Jean Krahn, NMG shows off her award for being part of CGC's Board of Trustees. Current CGC President, Fred Floreth, NMG thanks her for her service.

with the applicants' personal information supplied on the application. The applicants' educational background would also be verified. CGC staff was directed to verify the experience requirement of each applicant by having an independent third party supply proof of the applicant's experience by completing a form supplied to them by CGC or the applicant.

After reviewing all CGC accomplished, we are deeply appreciative of the commitment of our Board and of Jean Krahn. Because of the efforts put forth, certification of guardians will truly represent the gold standard of our profession. Jean, we thank you for the guidance you provided during this very busy year. We appreciate your dedication.



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CGC Makes Changes to CEU Policy

The Center for Guardianship Certification (CGC) is instituting changes to its continuing education unit (CEU) policy, which will be implemented effective January 1, 2013. Continuing education hours can be obtained either by being a participant or by being a presenter of a program meeting CGC's criteria. Appropriate programs include those offered at junior college, university, state bar association, NGA, state guardianship association, or other specific seminars or training courses related to guardianships.

Certification renewal requires a minimum of 20 hours of documented continuing education spread during the two



(2) year period for National Certified Guardians (NCGs) and 30 hours of documented continuing education spread during a three (3) year period for National Master Guardians (NMGs). These years encompass the years

previous to and the year in which the recertification is due. Continuing education hours can be obtained either by being a participant or by being a presenter of a program meeting CGC criteria. Certified guardians are encouraged to acquire more than the minimum CEUs required so that they can still be recertified even if some of the CEUs submitted are not accepted.

Continuing education content provided to certified guardians must:

- Be related to the CGC core competencies (the core competencies are listed on the CGC website);
- Be presented by certified guardians or other professionals, such as physicians, attorneys, social workers, nurses, psychologists, researchers, etc.;
- Be targeted to a professional audience;
- Be at least one hour (60 minutes) in length and thereafter in 15 minute increments;
- Be offered in the context of a professional level course, institute, seminar, workshop, conference or in-service training.
- When calculating hours, it is important to note that

one (1) contact hour equals 60 minutes of classroom time. This does not include introductory and closing remarks, business/board meetings, exhibits, networking meetings, support groups, breaks, meals, receptions, etc.

The new policy outlines the assigning of CEUs for various areas including participating at educational offerings, online and home study courses, teaching, and curriculum development. Details about each of these areas and a copy of the entire policy can be found on the CGC website under the “**recertification**” section.

CGC Changes Testing Center Provider

Following one year of providing examinations at testing centers, CGC has been informed that ACT will no longer provide this service for the guardianship examination. Therefore, the organization's Board made the decision to contract with PSI to provide testing centers for examinees.

Upon application approval by CGC, applicants will receive details about finding a testing center and will be able to schedule their examination at the time, date and location of their choice. The locations of the testing centers are not available for release on our website; however, applicants will receive details once they are approved to sit for the exam. PSI has locations in all 50 states in major metropolitan areas.

For detailed information on taking the examination, applicants can visit the CGC website at www.guardianshipcert.org and obtain a copy of the CGC Exam Handbook which can be found under the “**become certified**” link.

Kathleen Ann Eddy, NMG, Awarded National Master Guardian Star Achievement Award

During the National Guardianship Association's Annual Conference in Portland, Ore., **Kathleen Ann Eddy, NMG**, received the **National Master Guardian Star Achievement Award**. One of the highest honors bestowed by the Center for Guardianship Certification (CGC), the award recognizes the person's exemplary work as a CGC National Master Guardian and demonstrated knowledge of advanced guardianship concepts, ethics and issues.

For more than 28 years, Eddy has been with the state of Illinois. She spent 14 years as a Public Service Administrator with the Office of State Guardian. The previous 14 years, she was a Supervising Rights Coordinator with the Human Rights Authority. Prior to that, Eddy was with the Illinois Developmental Disabilities Advocacy Authority. She also served as a volunteer advocate in a regional parent group covering the western part of Illinois.

Eddy finds that NGA Standard 6 (Informed Consent) is important when managing guardianship services for approximately 450 persons under guardianship. She reminds her staff that it can be easy to get consumed with the daily demands from service providers and too often act in haste. But, according to Eddy,

The National Master Guardian Star Achievement Award is one of the highest honors bestowed by CGC.

providing informed consent is the core service of a guardian. She is tenacious in obtaining information from health care providers, facility staff, family and friends of each of her persons under guardianship.

Standard 9 (self-determination) is another value Eddy finds to be at the heart of her practice. She encourages her staff to model self advocacy behaviors so persons under guardianship that are able can learn how to better advocate for themselves, thus gaining more control over their lives.

Eddy encourages independent thought not only amongst her staff, but with the persons under guardianship as well. Her ultimate goal is for the wards to seek restoration of rights. If that isn't feasible, she encourages that limited powers be given to the state as guardian so the persons under guardianship are able to make more decisions on their own.



NMG Star Achievement Award recipient Kathleen Ann Eddy, NMG with CGC President Fred Floreth, NMG.

She reminds her staff of Standard 12 (duties of the guardian of the person). Eddy carefully monitors what each facility purchases for her persons under guardianship and from where the monies are obtained. Many times, she will find the facility will use person under guardianship money to buy care items that should be provided by the facility. Our recipient will request that the facility reimburse the persons under guardianship for the item. She also verifies the receipt of all public entitlement monies and makes suggestions for other funding sources.

Eddy promotes the highest guardianship standards to her staff and to persons under guardianship. She advocates for the needs of persons under guardianship and has truly demonstrated her knowledge of advanced guardianship concepts, ethics and issues.

Kathleen A. Buchanan, NCG, Honored With Fred Kretz Cornerstone Award

During the National Guardianship Association's Annual Conference in Portland, Ore., **Kathleen A. Buchanan, NCG**, was announced as the **Fred Kretz Cornerstone Award** recipient. One of the highest honors bestowed by the Center for Guardianship Certification (CGC), the award recognizes the recipient's significant contributions to CGC and the promotion of guardianship certification.

For more than 20 years, Buchanan has been working with the office of Clark County Public Guardian. She was appointed to run that office as the Clark County Public Guardian in 2000. Her office serves approximately 500 persons under guardianship and as representative payee for approximately 700 Nevadans.

She developed and implemented a program in conjunction with State and Federal authorities using the Electronic Benefit Transfer System for food stamp recipients on her program.

Buchanan has successfully utilized careful, respectful and judicial use of the media to assist her office in finding family and the true identities of "John Doe Persons under Guardianship," enabling these persons to receive the care and benefits they need.

Locally, she has been instrumental in serving as a resource for Nevada's state legislators through her appearance and testimony during public hearings and committee meetings. She has also assisted Nevada in passing guardianship reform such as requiring certification by CGC of private professional guardianships and passage of the Uniform Adult Guardianship and Protective Proceedings Jurisdictional Act.

Buchanan has been a member of the National Guardianship Association (NGA) since 1998, served on numerous NGA committees and on the NGA board and received the Outstanding Affiliate Member Award. She is a founding member of the Nevada Guardianship Association and served on its Board of Directors for several years.

In an effort to provide persons under guardianship with the best care possible, Buchanan requires her deputies and case managers to be certified by CGC. She encourages all those around her to practice the highest standards when working for persons under guardianship, and she is a deserving recipient of the Fred Kretz Cornerstone Award.

Lee Eakin, ACSW, NCG, Awarded National Certified Guardian Excellence Award

During the National Guardianship Association's Annual Conference in Portland, Ore., **Lee Eakin, ACSW, NCG**, was recognized with the **National Certified Guardian Excellence Award**. One of the highest honors bestowed by the Center for Guardianship Certification (CGC), the award recognizes the person's exemplary work as a CGC National Certified Guardian and demonstrated knowledge of advanced guardianship concepts, ethics and issues.

Since 2002 when Eakin began working as a Case Manager in the Guardianship Program in Alpert Jewish Family & Children's Service in West Palm Beach, Fla., he has served 165 persons under guardianship. In 2006, he assumed his current post as Director of the Guardianship Program, which has six full-time employees.

Because Eakin stands in the shoes of each vulnerable person under guardianship, he works diligently to preserve the dignity of their rights. He focuses on bringing respect and a sense of personhood to his clients. For example, Eakin visits frequently with a 96-year-old person under guardianship. Every visit, she retells a particular story of her travels as a younger woman. Although hearing the story has no clinical value, he listens as if he is hearing the story for the first time. He knows that recounting this story brings his client great joy.

Eakin not only advances the National Guardianship Association's Standards and Model Code of Ethics in his

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Lee Eakin, ACSW, NCG, Awarded National Certified Guardian Excellence Award

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own practice, but also has been instrumental in advancing them in the state of Florida. He was the driving force behind the state association's adoption of a policy that professional members of the association must read and affirm by signature that they have read and will practice in accordance with the National Guardianship Association's Model Code of Ethics.

To bring information and sensitivity about ethics to colleagues, Eakin encouraged the organizers of the 2011 State Guardianship Conference to highlight the topic of

Ethics in Guardianship. He also makes presentations himself; Eakin has presented for two years at the Elder Law Section's "Elder Concert," expanding the interface and positive relationship among the legal and guardian communities.

Eakin has an unusual ability to connect with his clients, regardless of their age or disability. He believes in ethical values, which means he takes the extra time to do things which allow clients to feel recognized and to maintain some self-worth. Eakin comprises the characteristics that being the first NCG Excellence Award recipient requires.

Welcome New National Certified Guardians

*Alphabetical by last name
June 6, 2012 to November 8, 2012*

Julia G. Ansel Fair Oaks, CA
Leslie A. Autry Lakeside, CA
Marc S. Belluomini Newport Coast, CA
Karen Bock Fabiano Eugene, OR
Samuel Bort Concord, CA
Joseph Broom Mt. Pleasant, SC
Duane F. Carey NAPA, CA
Angela A. Casavecchia Carthage, MO
Mary A. Chapot Santa Rosa, CA
Joy Claiborne Oakhurst, CA
Vergena Montgomery Clark,
MD, MBA/HAS Atlanta, GA
Jennifer A. Cohen Naples, FL
Brenda Dragomir San Jose, CA
Celine Dufresne Lakeland, FL
Treneatra Ann Farmer Inglewood, CA
Roxanna Gates Fairacres, NM
Beth Glazier Sun City, AZ
Linda Ann Hackett St. Petersburg, FL
Jennifer Harper Smyrna, DE
Lawrence A. Hempen Laguna Beach, CA
Robert W. Inglis Venice, FL
Candice Kilbourne Melbourne, FL
Carol Lynn King Bakersfield, CA
Denise F. Klein Studio City, CA
Kevan D. Kurt Santa Rosa, CA
Daniel J. Lanahan San Diego, CA
Diana M. Law Aurora, CO
Deborah Y. Lee Foster City, CA
Annette Galarneau Lerdahl Santa Rosa, CA
Judith W. Libert Rockville, MD
Ruven Liebhaber Lexington, MA
Xia Litz Erickson Salt Lake City, UT
Jolynn Lytle Windsor, CA

Jeffrey C. Mark Melbourne, FL
Michael J. Mazur Pacific Grove, CA
Michelle Yvonne McBee Concord, CA
Debbie Miller Salt Lake City, UT
James L. Morgan Odessa, FL
Meghan Motsinger Longwood, FL
Joni Namamura Robson San Carlos, CA
Colleen O'Shea Clarke Portland, OR
Robin Dell Peters Rockville, MD
Arlene E. Peterson San Jose, CA
Janice Martin Phillips Laguna Woods, CA
Karen B. Poeschel Granite Bay, CA
Michael D. Prilutsky San Ramon, CA
Diane Prosser Las Vegas, NV
Eric J. Raisch Fallbrook, CA
Caroline Michelle Reader San Diego, CA
Gabriel Ben-Or Rymal Webster, FL
SueAnn Sanders Sarasota, FL
Constance Elaine Sawyer Rockville, MD
Lauren D. Schmiidl Oldsmar, FL
Robert Schnieders La Crescenta, CA
Michael Jonathan Sclar Fallbrook, CA
Marc A. Simons Oceanside, CA
Leah Smith Artesia, NM
Claudette Springmeyer Minden, NV
Karen Marie Stagnaro Salt Lake City, UT
Amy Tupper Saint Cloud, MN
Brenda Vissering North Charleston, SC
Pamela Marie Wachholz Hemet, CA
Janet Kay Welborn Carmichael, CA
Theresa Whitfield Peoria, AZ
Debra Woods Terre Haute, IN
Kristin K. Woods St. George, UT
Lynn M. Yarish Bradenton, FL

Leon's Story: Being Productive at Any Time of Life

By: Kevin Burke

Leon was bed bound, with life-threatening heart problems and eyes so clouded by cataracts that they could only show him dim shadows and shapes. He had a sister who loved him and paid his bills, but she lived several hundred miles away and could only visit him a few times a year. His daily life revolved around the routines set by the caregivers at the Adult Family Home where he lived. They loved Leon as a sweet and afflicted man, not just as a paying customer. They were willing to stay up all night to ease the pain of his troubled breathing. He had come to think of them as family. He wanted to go on living, though he could not explain why. His days hung heavy; hours, afternoons and months slipping by amidst chronic pain and a constant sense of loss.

It seemed Leon's life was set. He would endure his pain and isolation as long as he could, and one day his chronic heart and lung problems would prove too much for him. He sometimes recalled flashes of his old life: walking his mail route, the smile of the wife who was long lost to him. He could listen to old westerns on TV Land, but due to his cataracts he could not even see the characters.

Guns smoke was playing the first day I met Leon. His sister had developed health problems and asked our company to take over as his fiduciary. Leon told me all about the episode, even though he could not see a thing. Marshal Dillon had to break up a ring of rustlers. Leon told me that they would soon be strung up from the nearest tree. His sense of frontier justice was harsher and probably more accurate than the 1960's TV writers. As Leon and I talked, Marshal Dillon arrested the evildoers and sent them off for a fair trial.

The first year we worked with Leon, he nearly passed away five times. He would spend weeks in the hospital, begging us not to let him go. His care manager and I endured the scowls of his treating physicians who did not see him as having any hope or even being worth their time and energy. While his medical professionals may have had his diagnoses and expected demise on their side, my oath was to respect and protect Leon. He was unable to run his life, but he was able to tell me he wanted to get treatment, to keep trying.

What broke this cycle was art therapy. An independent art therapist began working with Leon. They made dioramas showing the Civil War and the Wright

Brother's first flight. The art therapist did most of the work... well, almost all of the work. Leon could barely grasp a paintbrush. But the ideas were all Leon's.

As Leon's imagination was stimulated, his health improved. We were able to convince his doctors to let him have cataract surgery. Now he could see Ben Cartwright and Marshal Dillon. He could enjoy the artwork that came out of his imagination. And he began to write stories. Dictated to his art therapist, these are long, rambling tales where adventure and complexity vastly outpace common sense and everyday thinking.

It has been two years since Leon discovered the ability to express himself. He still spends his days bed-bound with major medical issues, but he also spends his days making his art and enjoying watching movies. His health and comfort measurably improved once he found a way to give back to the world, to create, to feel like he mattered. Of course when Leon gets carried away, his art therapist reminds him he will probably not make a million dollars or win the Pulitzer Prize. Reality must intrude upon us all at some point.



One of the most challenging and tragic aspects of disability is the loss of the feeling of being productive, of mattering to someone, of contributing to the life around you. When a person faces serious health or cognitive challenges being productive, mattering, can seem so distant and complete a loss that it is hardly noticed.

But the last phase of life does not have to be only about loss. It can also be about discovery. In an important way, Leon has had the same experience as the Pulitzer Prize winners who will never hear his name. He lived a life, came up with some stories and shared them with those willing to listen. He was here, and he said his piece.

We have seen similar success stories arranging art therapy for people with significant dementia or suffering the symptoms of isolation and depression. Even if the only audience is the art therapist, connecting to the feeling of creating opens a direct pathway for people suffering a disability back to the best part of this world we all share.

Kevin Burke is a Fiduciary at Beagle, Burke & Associates in Portland, Oregon. His blog is available at the Beagle Burke website or by [clicking here](#).

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