



## **GUARDIANSHIP OF IOWA NETWORK**

**Guardianship and Conservatorship 101**

**AUGUST 26, 2022**

**9:00 a.m. to 4:00 p.m.**

**HYBRID MEETING: in person at the Iowa State Bar Association (ISBA) office,  
625 E. Court Avenue, Des Moines, Iowa 50309 as well as virtually**

GAIN is pleased to offer a unique training opportunity for guardians, conservators, family members, volunteers, service providers and others interested in learning more about guardianship and conservatorship and least restrictive alternatives

### Registration costs

Members of GAIN: \$35.00

Non-Members of GAIN\*: \$50.00

Sack Lunch Meal: \$10.00

Family and Volunteer Guardians: Scholarships available

\*To become a member, go online to [www.iowaguardianship.org](http://www.iowaguardianship.org) and complete the NEW Member online registration form. This can be found under the Membership tab once on the website. Membership allows you to participate in monthly webinars, receive information on training opportunities, to attend GAIN trainings and its conference at a reduced rate and to be a part of a vibrant network of colleagues to learn and share.

Certificates of attendance will be available for CEU's and CLE's will be requested



## **AUGUST 26, 2022 AGENDA**

### **8:30 to 9:00 Registration**

**9:00 Welcome** – GAIN Board Member Nathan Miller, President and GAIN Executive Director Deanna Clingan-Fischer

**9:15 – 9:45: Is Guardianship Needed?** Looking at alternatives: Deanna Clingan-Fischer

### **9:45 to 10:45: The Basics of Guardianship and Conservatorship:**

Jennifer Donovan and Sherri McLerran

- What is a Guardian? What is a conservator?
- What are the duties and responsibilities?
- What is the court process, When to obtain court approvals, court and termination
- How to determine impaired capacity

### **10:45 – 11:00: Break**

**11:00 – 12:00 How does a Guardian/Conservator get appointed? What Reports are Required and Where are the Forms?** Cynthia Bahls and Nathan Miller

- Process for filing a petition
- Oath of Office
- Reports required and how to file

### **12:00 – 1:00 Lunch break**

**1:00 – 2:00: Guardianship best practices:** Sherri McLerran

- Confidentiality
- Best Interests
- Ethical considerations

**2:00 – 2:30: Navigating conservatorship minefields:** Julie Versluis

- Accounts and commingling
- Priorities for spending
- Relationship with Payee and Federal Fiduciary
- Liability



**2:30 – 2:45: Break**

**2:45 – 3:45: Navigating challenging relationships: Kristen Boldt**

- Mediation
- Family team meetings
- Visitation and restrictions
- Dating and sexual relationships
- Maintaining important relationships

**3:45 – 4:00: Final Q&A, Wrap-up, Conclusion**

## **Speakers:**

*Cynthia Bahls, JD. Attorney at Law, The Law Shop, Van Meter, Iowa 50261*

*Kristen Boldt, JD. Attorney at Law, Harmony Law, Windsor Heights, Iowa 50324*

*Deanna Clingan-Fischer, JD, Executive Director at GAIN, Altoona, Iowa 50009*

*Jennifer Donovan, JD, State Public Guardian, Office of Public Guardian, Des Moines, Iowa 50319*

*Sherri McLerran, NCG, Owner of Decisions for Life, LLC, Altoona, Iowa 50009*

*Nathan Miller, JD, Attorney at Law, Beecher, Field, Walker, Morris, Hoffman & Johnson, PC, Waterloo, Iowa 50703*

*Julie Versluis, Trust Officer, Fidelity Bank and Trust, Waverly, Iowa 50677*



## August 26, 2022 Guardianship and Conservatorship Training Registration Form

<b>Name</b>	
<b>Organization, if any</b>	
<b>Address</b>	
<b>Email</b>	
<b>Telephone</b>	
<b>Profession</b>	
<b>Will you attend in person or virtually?</b>	

**Registration Costs—mark the applicable rates**

\_\_\_\_\_ \$35.00 GAIN Member

\_\_\_\_\_ \$50.00 Non-GAIN Member

\_\_\_\_\_ \$10.00 Sack Lunch—Deli or Veggie Sandwich Preference \_\_\_\_\_

\_\_\_\_\_ Family or Volunteer Guardian (Scholarship may be available)

Send completed form and check to:

Guardianship Association of Iowa Network  
PO Box 232  
Altoona, IA 50009

OR Register and Pay online at

[www.iowaguardianship.org/events/#!event/2022/8/26/guardianship-101-training](http://www.iowaguardianship.org/events/#!event/2022/8/26/guardianship-101-training)

Questions: Call 515-412-4969 or Email at [iowaguardians@gmail.com](mailto:iowaguardians@gmail.com)