

The Complexities of Quality Care in the 21st Century

Conference Agenda 10 CEUs / 3.5 Ethics CEUs

Thursday, March 4, 2010			
8:00am to 9:00am	Breakfast / Registration		
9:00am to 9:30am	Opening Ceremonies / Membership Meeting Lisa M. Price, NCG, LF, AFA President Entrust Fiduciary Services, Inc.		
9:30am to 10:30am 1.0 CEU	Plenary Session National Guardianship Trends Gary Beagle, Center for Guardianship Certification		
10:30am - 10:45am	Break		
10:45am to 11:45pm 1.0 CEU	Post Traumatic Stress Disorder Deborah Dominick, Phoenix Veteran's Administration		
11: 45am - 1:00pm 1.0 CEU	Lunch Preventing Claims to Keep Your Practice and Reputation Thriving: Fiduciary Professional Liability Claims Review Andrew R. Jones, Furman Kornfeld & Brennan Lawrence D. Hilton, Dominion Insurance Services		
1:00pm to 2:00pm 1.0 CEU (Ethics)	Preserving Your Ward's Autonomy Robert Fleming, Esq., LF, Fleming & Curti, PLC		
2:00pm - 2:15pm	Break		
Breakout Sessions	Decision Making For Practitioners Room TBA	Quality Care - Eligibility & Services Room TBA	Legalities & Protection for Fiduciaries in the 21st Century Room TBA
2:15pm to 3:15pm 1.0 CEU	Fiduciary Jeopardy, Heather Winters-Bull, LF The Sun Valley Group, Inc. & Cathy Yoshida Corella, LF, Maricopa County Fiduciaries Office		Unraveling the Mysteries of Fiduciary Bonding James L. Smith Arizona Commercial Bonding, LLC
3:15pm to 3:30pm	Break - Thank Sponsors		
3:30pm to 4:30pm 1.0 CEU	Obstacles to Good Judgment & Decision Making John Lloyd, LF, Coconino County Public Fiduciary's Office	Prudent Investing & Quality of Life Considerations- Ted Ong, Prudent Investors Network	Managing Tricky Appraisals Tom Helms, AZ Appraisal Services and Estate Consultants
4:30pm to 5:30pm 1.0 CEU	Technology and Going Paperless Heather Frenette, LF, The Sun Valley Group, Inc.	ALTCS Qualification - Overcoming the Hurdles Victoria Blair, Fleming & Curti, PLC	Inherent Liabilities for Fiduciaries Robert Finkbeiner & Sherry Gamble, HUB International Insurance Services

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Friday, March 5, 2010			
7:00 am to 8:00 am	Sponsors Breakfast / Registration		
8:00 am to 9:30am 1.5 CEU (Ethics)	Plenary Session Panel Presentation Fiduciary Fees and Billing Practices Marlene Appel, Esq., LF, Law Office of Marlene Appel Pam Johnston, LF, Certified Fiduciary Services, Inc. Jay Polk, Esq. Barron & Polk, P.L.L.C Lisa M. Price, LF, NCG, Entrust Fiduciary Services, Inc. Deborah Primock, LF, Southwest Fiduciary, Inc.		
9:45 am to 10:45am 1.0 CEU	Traumatic Brain Injury Dr. Cardenas, Barrows Neurological Institute		
10:45am to 11:00am	Break		
11:00am to 12:00pm 1.00 CEU (Ethics)	Plenary Session Substituted Judgment Denice Shepherd, Esq., LF, Law Office of Denice R. Shepherd		
12:00 pm to 1:15pm 1.00 CEU	Lunch and Break Uniform Adult Guardianship and Protective Proceedings Jurisdiction Act (HB2426) Jay Polk, Esq. Barron & Polk, P.L.L.C		
1:15pm to 2:15pm 1.0 CEU	Caring for Clients with Bipolar Disorder Tanya Feinberg, MD		
2:15pm to 2:30pm	Break		
Break Out Sessions	Decision Making For Practitioners Room TBA	Quality Care - Eligibility & Services Room TBA	Legalities & Protection for Fiduciaries in the 21st Century Room TBA
2:30pm to 3:45pm 1.25 CEU	Gifts: A Blessing or a Curse Laura Simms, LF, Apache County Public Fiduciary	How to Help the Mentally Ill John Gallagher, ADHS Division of Behavioral Health Services Office of Human Rights	IRA's and Roth IRA's - New Opportunities for 2010 Robert S. Wade, Vision Financial Consultants