

Guardianships and Conservatorships

Updated Forms and Procedures

This program offers timely and relevant information regarding a broad range of guardianship and conservatorship issues, including:

- ✓ An overview of guardianships and conservatorships
- ✓ Settling minor's claims
- ✓ Emergency proceedings
- ✓ Current court policies
- ✓ Updated forms based on the experience of leading practitioners

Attorneys, professional guardians or conservators, social workers, legal assistants, or any other professionals who practice in the area will benefit from this program.

FRIDAY, OCTOBER 23, 2009

Oregon Convention Center
777 NE Martin Luther King Jr. Blvd.
Portland, Oregon

6.75 General or Practical Skills MCLE Credits

FORMS ON CD

The forms included in the course book are available on a CD in Word and WordPerfect format for an additional \$20.



SCHEDULE

- 8:00 a.m. LATE REGISTRATION AND DISTRIBUTION OF MATERIALS
- 8:25 WELCOME AND INTRODUCTION
– *Mark M. Williams*
- 8:30–9:30 **Guardianships**
- Overview of guardianships and alternatives
 - The intake process and case evaluation
 - Court filings, service, and notices
 - Contested case hearings
 - The powers and duties of a guardian
 - Issues related to minors
 - Case updates, new legislation
– *Don B. Dickman*
- 9:30–10:30 **Conservatorships**
- Initiating the protective proceeding
 - Contesting proceedings
 - Managing the estate
 - Actions requiring court approval
 - Claims
 - Accountings
 - Terminating and closing
– *Lisa N. Bertalan*
- 10:30–10:45 BREAK
- 10:45–11:30 **Settlement and Handling of Minor's Claims**
- Procedures to settle minor's claims of less than \$25,000
 - Procedure to settle minor's claims of more than \$25,000
 - Methods of investing and securing the funds
 - Restricting access to the funds even beyond the age of majority
 - Use of the funds for the minor's benefit during the term of minority—what is appropriate?
 - Payment of attorney fees and costs—procedure and pitfalls
 - Minor's involvement in the process—notice? Right to object?
– *Brooks F. Cooper*
- 11:30–12:00 **Court Visitors**
- Statutory role of court visitor
 - Visitor's investigation and assessment
 - Marion County Visitors' Improvement Project
– *Pat Duke, MSW, LCSW*
– *Katie Garman, RN, BSN*
- 12:00–1:00 LUNCH (on your own)
- 1:00–1:45 **Emergency Proceedings**
- Circumstances constituting emergency
 - Essential elements of the petition
 - Notice
 - Appointment of the temporary fiduciary
 - Closing the temporary proceeding
– *Tim McNeil*

SCHEDULE (cont.)

- 1:45–2:30 **Attorneys and Abuse Investigators—
We Need Each Other**
- Role of protective services
 - Interaction with law enforcement
 - How lawyers, law enforcement, and protective services work together to protect vulnerable populations
- Moderator: *Dady K. Blake*
- *Eva Kutas*
 - *Randy Morrison*
 - *Deanna L. Wesson*
- 2:30–2:45 BREAK
- 2:45–3:30 **Contested Guardianships and Conservatorships**
- Objections to petitions
 - Evidence at hearings
 - Medical evidence
 - Court visitor testimony
- *Stephen R. Owen*
- 3:30–4:15 **Current Court Policies**
- *Hon. Claudia M. Burton*
 - *Hon. Rita Batz Cobb*
 - *Hon. Lauren S. Holland*
 - *Hon. Katherine E. Tennyson*
- 4:15 p.m. ADJOURN

Planning Committee

Dady K. Blake

Attorney at Law

Douglas A. Harrison

Law Offices of Nay & Friedenberg

Tim McNeil

Davis Pagnano McNeil & Vigna, LLP

Stephen R. Owen

Fitzwater Meyer, LLP

S. Jane Patterson

Attorney at Law

Mark M. Williams

Gaydos, Churnside & Balthrop, PC

Program Faculty

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Hon. Claudia M. Burton

Marion County Circuit Court Judge

Hon. Rita Batz Cobb

Washington County Probate Judge

Brooks F. Cooper

Attorney at Law

Don B. Dickman

Don B. Dickman PC

Pat Duke, MSW, LCSW

Court Visitor

Katie Garman, RN, BSN

Court Visitor

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*Director, Office of Investigations
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& Disability Services,
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Deanna L. Wesson

*Officer, Portland Police Bureau,
Vulnerable Adult & Elder Crime Unit*

LIVE PRESENTATION

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Oregon Convention Center
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MCLE CREDIT

*Guardianships and Conservatorships:
Updated Forms and Procedures* will
receive **6.75** General or Practical
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VIDEO REPLAYS

Please register at least one week
prior to the replay date.

Bend – 11/6/09

Replay 8:30 a.m.
Bryant Lovlien & Jarvis
591 Mill View Way

Eugene – 10/30/09

Replay 8:30 a.m.
Harrang Long Gary & Rudnick PC
360 East 10th Avenue, Ste. 300

Medford – 10/30/09

Replay 8:30 a.m.
Kellington Krack Richmond
Blackhurst & Glatte LLP
23 Newtown Street

Portland – 11/11/09

Replay 9:00 a.m.
Oregon Law Institute
Gus J. Solomon Courthouse
620 SW Main Street, Ste. 706

Guardianships and Conservatorships

Friday, October 23, 2009

Name	OSB No. or Profession
Firm/Organization	
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Please "✓" appropriate box below:

- Live presentation
- Video replay. Location: _____ Date: _____
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TUITION (Prices apply to live and video replays. **FORMS ON CD:** The forms discussed by the faculty are included in the course book and are available on a CD in Word and Word-Perfect format for \$20.)

- \$179** Early registration tuition (received by October 19, 2009)
- \$139** Early registration tuition for new attorneys (admitted 2008–2009), paralegals, or secretaries (received by October 19, 2009)
- \$90** Legal aid attorneys (received by October 19, 2009)
- \$15** OLI Annual Passholder (OLI Pass No. _____)
- \$20** Forms on CD (\$10 for OLI Passholders)
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PRODUCT ORDER

I am unable to attend. Please send me:

- \$199** Audio CDs and course book
- \$299** DVDs and course book
- \$59** Course book only
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CONFIRMATION: Confirmation will be sent via e-mail.**CANCELLATION POLICY:** Tuition minus a \$20 handling charge will be refunded if the cancellation request is *written and received* by Monday, October 19, 2009.**NEED ASSISTANCE:** If you are a person with a disability, please let OLI know in time to make any necessary accommodations for you.**TUITION ASSISTANCE:** A limited number of scholarships are available based on financial need. Contact OLI.