

Guardianships: A Practical Approach



October 7, 2014

November 7, 2014

December 2, 2014

This series is presented by the Public Services Involvement Committee in conjunction with the Pro Bono Program for the Elderly and The Volunteer Lawyer Program.

Subject to Supreme Court Rule IV 3 each individual session has been approved by the MCLE Commission for the credits noted.

Sessions

Session 1

*October 7, 3:00 - 6:00 pm
2.0 credits + .1.0 ethics*

Introduction

- What is guardianship – adults, minors
- Basics, reasons for it
- Different types – temporary, full & limited
- Alternatives/supported decision making
- Who is the client?
- Relationship between guardian, ward and attorney
- How to get paid
- Confidentiality

Session 2

*November 7, 1:00 - 4:00 pm
2.0 credits + .1.0 ethics*

Practicalities & Procedures

- What to expect in court?
- What do you bring? Forms?
- Notice Requirements
- Service on ward
- Meeting with GALs
- Assessing the GAL report
- Best Practices
- Fees & What you can charge
- Bonds
- Ending the Guardianship

Session 3

*December 2, 4:00 - 6:00 pm
1.5 credits + .5 ethics*

Special Needs Trusts & Other Unique Issues

- Special Needs Trusts
- Representative Payee
- Powers of Attorney
- Friendly suits?GAL
- Spend thrift trusts
- Pooled Trusts
- Interfamily squabbles

Guardianships – *A Practical Approach*

Each session of this three part series addresses the legal and ethical issues that often arise in a guardianship practice.

Session One will provide you with the ABC's of guardianship practice as well as explain the potential alternatives to guardianship. *Session Two* will explore the related ethical concerns surrounding the interests of the guardian and ward and how to navigate this tightrope of interests and will also include review of the forms, notice requirements and different types of guardianships. *Session Three* will focus on alternatives to guardianship and less restrictive mechanisms to protect the interests of clients and persons in need of assistance.

This series is presented by the Public Services Involvement Committee in conjunction with the Pro Bono Program for the Elderly and the Volunteer Lawyer Program.

The VLP Program is funded by Rhode Island Legal Services, Inc. and the Rhode Island Bar Foundation. The Referral Service for the Elderly is funded by the RI Department of Elderly Affairs and the RI Bar Foundation. Both programs are offered as a public service of the Rhode Island Bar Association.

Speakers

Brian Adae, Esq.
RI Disability Law Center, Inc

Nancy Fisher Chudacoff, Esq.
Hardy Tabor & Chudacoff

Christine J. Engustian, Esq.
Probate Judge, East Providence

Barbara L. Margolis, Esq.
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David F. Reilly, Esq.
Law Offices of David F. Reilly

Moderators

Stephen M. Miller, Esq.
Providence

Elizabeth W. Segovis, Esq.
RI Legal Services, Inc.

You must agree to accept a pro bono guardianship case to complete the registration process. Only one pro bono case is required for you to attend one or all three sessions.

Registration Form – Guardianship 2014

NAME

FIRM/ORGANIZATION

ADDRESS

CITY/STATE

ZIP

PHONE

BAR ID#

EMAIL ADDRESS

You will receive an email confirmation of your registration.

I will attend:

___ Session 1 Tuesday, October 7

___ Session 2 Friday, November 7

___ Session 3 Tuesday, December 2

**Please mail registration form to:
Volunteer Lawyer Program
Rhode Island Bar Association
115 Cedar St.
Providence, RI 02903
or fax to 401-421-2703**

You must agree to accept a pro bono guardianship case to complete the registration process. Only one pro bono case is required for you to attend one or all three sessions.

Registration Details

DATE/ TIME/ PLACE

All sessions will be held at
Rhode Island Law Center
115 Cedar St., Providence

Session 1 – Introduction

Tuesday, October 7
3:00 p.m. – 6:00 p.m.
2.0 credits + 1.0 ethics

Session 2 – Practicalities & Procedures

Friday, November 7 (lunch included)
1:00 p.m. – 4:00 p.m.
2.0 credits + 1.0 ethics

Session 3 – Special Needs Trusts, and Other Unique Issues

Tuesday, December 2
4:00 p.m. – 6:00 p.m.
1.5 credits +.5 ethics

TO REGISTER

You must agree to accept a pro bono guardianship case in order to complete the registration process. The staff will contact you with an available pro bono case or you may reach them at 401-521-5040, 401-421-7758, or contact: Elisa King eking@ribar.com; John Ellis jellis@ribar.com

FURTHER INFORMATION/SPECIAL ACCOMMODATION

You may call the Pro Bono Program for the Elderly at the Rhode Island Bar Association 401-521-5040, 401-421-7758 or contact: Elisa King eking@ribar.com; John Ellis jellis@ribar.com; Please indicate on the registration form any special accommodation you may require or call us.