

# Guardianships and Conservatorships 2023

*Cosponsored by the Elder Law Section*

Register at [osbar.org/seminars](https://osbar.org/seminars) (search for GC23)



**Friday, February 3, 2023**

**9:00 a.m.–3:45 p.m. PST**

**Oregon State Bar Center**

16037 SW Upper Boones Ferry Rd., Tigard or  
Via Live Webcast

CLE credits: 4.25 General and 1 Abuse Reporting

MCLE ID #: 96274

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Guardianship and conservatorship are key components of an elder law practice. This program covers guardianships for adults and the alternatives and the basics of conservatorships. Gain an understanding of when to use limited conservatorships and protective orders and receive updates on Oregon Judicial Department protective proceedings. Explore your elder and child abuse reporting requirements.

**Elder Law Section members save \$20 off registration rates.**

**Scholarships:** The Elder Law Section has one need-based registration scholarship for an Elder Law Section member who is a new attorney or new to Elder Law to attend this event. To apply, send your name, bar number, phone number and a brief statement about your experience as an attorney and the need for a scholarship to: Anastasia Meisner, [ameisner@samuelslaw.com](mailto:ameisner@samuelslaw.com) by Jan. 23. Requests are considered in the order received. Please do not include any financial documentation or sensitive personal information with your scholarship request.



## Live Event

\$125 ONLD

\$180 Elder Law Section members

\$200 OSB member

\$210 Non-OSB member

\$15 Box lunch

*Electronic materials are included with your registration.*



## Live Webcast

\$125 ONLD

\$180 Elder Law Section members

\$200 OSB member

\$210 Non-OSB member

*Webcast registration includes online access to the recorded seminar for 60 days after the event. Electronic materials are included with your registration.*



## Need help with registration, refunds, tuition assistance or accessibility accommodations?

Call or email the OSB CLE Service Center:  
**(503) 431-6413** or **(800) 452-8260, ext. 413**  
or [cle@osbar.org](mailto:cle@osbar.org)

**Please contact us at least 24 hours before the seminar for refunds and 72 hours before the seminar for accessibility accommodations.**

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## Program Schedule

### 8:30 Continental Breakfast and Registration

### 9:00 Guardianship for Adults and the Alternatives

- Alternatives to protective proceedings
- Understanding the petition process
- Court expectations of the guardian/representing the guardian after appointment
- Other protective orders

**Brett Callahan**, *Law Offices of Nay & Friedenber*g LLC, Portland, OR

**Garvin Reiter**, *Law Offices of Nay & Friedenber*g LLC, Portland, OR

### 10:00 Transition

### 10:05 Conservatorship Basics

- Intake tips and tricks
- Pleadings and procedure
- Managing the estate and accountings
- Legislative updates

**Rachele Selvig**, *Davis Hearn Anderson & Selvig PC*, Ashland, OR

### 10:50 Break

### 11:00 OJD Protective Proceedings Monitoring Updates

- Future court expectations and standardization
- SB 578 appointment of counsel updates and process
- Conservatorship Auditing Program
- Indicators of potential concern in court filings

**Christian Hale**, *Oregon Judicial Department*, Salem, OR

**Bryan Marsh**, *Oregon Judicial Department*, Salem, OR

### 11:45 Transition

### 11:50 When to Use Limited Conservatorships and Protective Orders

- Medicaid planning
- Approval of settlement
- Establishment of trust

**Garvin Reiter**, *Law Offices of Nay & Friedenber*g LLC, Portland, OR

### 12:20 Lunch

### 1:15 Protected Not Silenced

- Restrictions on guardianships (ORS 125.300(1)(a))
- Rights maintained by protected persons (ORS 125.300(3))
- Notice of appointment of guardian
- Appointment of counsel (ORS 125.080(6)(a))

**Susan Ezzy Jordan**, *Jordan & Williams LLC*, Junction City, OR

### 1:45 Transition

### 1:50 Fees and Costs

- Attorney fees
- Fiduciary fees
- Visitor fees
- Filing fees
- Court bonds

**Daniela Holgate**, *Samuels Yoelin Kantor LLP*, Portland, OR

### 2:35 Break

### 2:45 Elder and Child Abuse

- Indicators and signs of both child and elder abuse
- Understanding mandatory laws and guidelines within professions for reporting child and elder abuse
- Where, when, and what information to provide when reporting child and elder abuse in Oregon

**Billie McNeely**, *DHS APD Elder Financial Exploitation Specialist*, Salem, OR

**Rebecca Kueny**, *Kueny Law LLC*, Salem, OR

### 3:45 Adjourn

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## Planning Committee

**Megan Fuhrer,**

*Attorney at Law, Fairview, OR*

**Kathryn Gapinski,**

*Gapinski Law LLC, Portland, OR*

**Steven Heinrich,**

*Attorney at law, Corvallis, OR*

**Rebecca Kueny,** *Kueny Law LLC, Salem, OR*

**Kay Hyde-Patton,**

*Leahy Cox LLP, Springfield, OR*

**Julie Meyer Rowett,**

*Yazzolino & Rowett LLP, Portland, OR*

**John Shickich,**

*Fisher Investments, Camas, WA*

**Mark Williams,**

*Jordan & Williams, Junction City, OR*

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## Products

GC23.CD

Audio CDs with electronic materials.....\$200

This seminar will be available on-demand after the live program. Please visit [www.osbar.org/seminars](https://www.osbar.org/seminars) and search for GC23. On-demand access is available for 60 days after the date of purchase.

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## General Information

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**Tuition Assistance:** Email a request stating your financial situation to [cle@osbar.org](mailto:cle@osbar.org) or call the OSB CLE Service Center at (503) 431-6413 or (800) 452-8260, ext. 413, no later than one week before the seminar.

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## Dietary Restrictions or Accessibility

**Accommodations:** Please call (503) 431-6375 or (800) 452-8260, ext. 375, at least 72 hours before the date of the seminar.



**Questions or need help with registration?**

*Call the OSB CLE Service Center:*

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