

# Guardianships and Conservatorships 2025

*Cosponsored by the Elder Law Section*

Register at [www.osbar.org/seminars](http://www.osbar.org/seminars) (search for GC25)



Guardianship and conservatorship are key components of an elder law practice. This program covers guardianships for adults and the alternatives as well as the basics of conservatorships. Learn about indigent guardianship and protected person's rights. Explore ethical considerations unique to surrogate, fiduciary, and diminished capacity clients. Review statewide probate updates and initiatives.

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

**Special thanks to the Elder Law Section for sponsoring lunch for all in-person attendees.**

## Scholarships

The Elder Law Section has three need-based registration scholarships for Elder Law Section members who are new attorneys (six or fewer years of practice) or are new to an elder law practice. 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: Rachele Selvig, [rselvig@davishearn.com](mailto:rselvig@davishearn.com) by Monday, February 3. Requests are considered in the order received. Please do not include any financial documentation or sensitive personal information with your scholarship request.

**Friday, February 14, 2025**

8:25 a.m.–3:30 p.m. PST

**Oregon State Bar Center**

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

CLE credits: 3.75 General, 1 Access to Justice,  
and 1 Ethics

MCLE ID #: 118137

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### In-Person Event

\$125	ONLD Member
\$180	Elder Law Section member
\$200	OSB Member
\$210	Non-OSB Member
\$0	Box lunch (section sponsored)

*Electronic materials are included with your registration.*



### Live Webcast

\$125	ONLD Member
\$180	Elder Law Section member
\$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.*



*Closed captions available*

50-Year and Active Pro Bono OSB members and Oregon judges and their lawyer staff – please call the OSB CLE Service Center at (503) 431-6413 or (800) 452-8260, ext. 413 to register for the seminars.



**Questions or need help with registration?**

**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)**

**Schedule**

<b>8:00</b>	<b>Registration and Continental Breakfast</b>	<b>11:45</b>	<b>Lunch (included with in-person registration)</b>
<b>8:25</b>	<b>Welcome</b>	<b>12:30</b>	<b>Low-Income Guardianships: What's the Fix?</b> <ul style="list-style-type: none"><li>• Financial barriers for guardianships and the impact on Oregon</li><li>• Central Oregon Guardian Assistance Program</li><li>• Indigent guardianship programs</li><li>• Ideas on low-income programs for guardianship</li></ul> <b>Megan Horner, Horner Law LLP, Bend</b> <b>Rebecca Kueny, Kueny Law LLC, Salem</b>
<b>8:30</b>	<b>Guardianship for Adults and the Alternatives</b> <ul style="list-style-type: none"><li>• Alternatives to protective proceedings</li><li>• Understanding the petition process</li><li>• Court expectations of the guardian/representing the guardian after appointment</li><li>• Other protective orders</li></ul> <b>Alex Bluestone, Alex Bluestone Law LLC, Salem</b> <b>Brook Wood, Rudolph &amp; Edgel LLP, Lake Oswego</b>	<b>1:30</b>	<b>Transition Break</b>
<b>9:30</b>	<b>Transition</b>	<b>1:35</b>	<b>Statewide Probate Updates and Initiatives</b> <ul style="list-style-type: none"><li>• Statewide probate snapshot</li><li>• SB 578 attorney appointment updates</li><li>• State Protective Proceeding Advisory Committee (SPPAC)</li><li>• UTCR Chapter 9 proposal</li></ul> <b>Jeffrey Petty, Probate Analyst, Oregon Judicial Department, Salem</b>
<b>9:35</b>	<b>Conservatorship Basics and Bonding</b> <ul style="list-style-type: none"><li>• Standards for conservatorships</li><li>• Considerations for choice of conservator</li><li>• Initiating pleadings</li><li>• Ongoing management of the estate</li></ul> <b>James Gardner, Gardner Beckley Meadows, Eugene</b>	<b>2:35</b>	<b>Break</b>
<b>10:35</b>	<b>Break</b>	<b>2:45</b>	<b>Disability Rights Oregon: Who Are They? What Do They Do? Why Are They Here?</b> <ul style="list-style-type: none"><li>• Intro to DRO guardianship representation team</li><li>• What services does DRO offer?</li><li>• When does DRO get involved with protective proceedings?</li><li>• What should you know about having DRO on a case?</li></ul> <b>Christopher Hamilton, Disability Rights Oregon, Portland</b> <b>Caryn Jones, Disability Rights Oregon, Portland</b>
<b>10:45</b>	<b>Ethical Considerations Unique to Surrogate, Fiduciary, and Diminished Capacity Clients</b> <ul style="list-style-type: none"><li>• Who's your client</li><li>• Represented respondents</li><li>• Diminished capacity</li><li>• Conflicts of interest with family</li><li>• Client confidentiality (especially when there is diminished capacity) and release of information</li></ul> <b>Heather Gilmore, Heather O. Gilmore PC, Keizer</b> <b>Tim McNeil, Davis Pagnano McNeil &amp; Vigna LLP, Portland</b> <b>Mark Williams, Attorney at Law, Junction City</b>	<b>3:30</b>	<b>Adjourn</b>

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## Planning Committee

**Stephanie Carter**, *Hilary Carter Law, Tigard, OR*

**Megan Fuhrer**, *Wy'East Law LLC, Portland, OR*

**Kathryn Gapinski**, *Gapinski Law LLC, Portland, OR*

**John Hemmerich**, *Attorney at Law, Portland, OR*

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

**John Shickich**, *Fisher Investments, Camas, WA*

**Mark Williams**, *Jordan & Williams, Junction City, OR*

## General Information

**Cancellations:** Cancellation requests must be received at least 72 hours prior to the date of the seminar to qualify for a refund. Refunds are subject to a \$25 cancellation fee. To cancel, please call the OSB CLE Service Center at (503) 431-6413 or (800) 452-8260, ext. 413.

**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.

### 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.

**Hotel Accommodations:** Discounted rates are available at The Grand Hotel at Bridgeport, 7265 SW Hazel Fern Rd., Tigard, OR 97224. Call 503-968- 5757 / toll free 1-866-968-5757 and reference the Oregon State Bar rate or [click here](#) to reserve online.

## Products

GC25.CD

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

This seminar will be available on-demand after the live program. Please visit [www.osbar.org/seminars](http://www.osbar.org/seminars) and search for GC25. On-demand access is available for 60 days after the date of purchase.



CLE  
Seminars

## Upcoming Seminars

### February 7

All Things Juvenile Law: Delinquency, Dependency, and Social Connectedness

JUV25

### February 13

Housing Issues in Elder Law

ELLT25

### February 28–March 1

2025 Litigation Institute & Retreat

Trial Skills for Today's Litigators: Revisit, Refresh, and Reboot

LI25

Register now at [www.osbar.org/seminars](http://www.osbar.org/seminars) and search by program code.