



----- CLE SEMINAR -----

# Adult Guardian ad Litem Training 2017

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**LIVE** SEMINAR: **Thursday, May 11, 2017 – Madison**  
WEBCAST: **Thursday, May 11, 2017**

**REPLAY** WEBCAST: **Monday, May 22, 2017**  
WEBCAST: **Tuesday, May 30, 2017**  
WEBCAST: **Wednesday, June 7, 2017**  
WEBCAST: **Monday, June 12, 2017**  
WEBCAST: **Friday, June 23, 2017**

CREDITS **7.5** CLE  
GAL Adult  
**1.0** EPR

# Adult Guardian ad Litem Training 2017

7.5 CLE/GAL Adult | 1 EPR

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## Receive top training

Whether you're a brand new GAL or have been doing it for years, our popular annual training is full of the important principles and useful advice that can help GALs of all experience levels be successful.

The *Adult Guardian ad Litem Training 2017* provides guidance for every stage of guardianship and protective placement cases, from your first appointment all the way through to final payment. Key topics covered include:

- Watts reviews
- Temporary guardianships
- Pro se petitioners and unrepresented parties
- Ethical duties and responsibilities unique to GALs

## Take on challenges

Not every case is simple. Learn strategies for approaching difficult situations, such as:

- Interviewing adults with dementia, mental illness, disabilities, and other impairments
- Suspected abuse or mistreatment
- Mediation and litigation in contested guardianship proceedings

## Great guidance for Adult GALs

From the straightforward cases to the complex conundrums, the *Adult Guardian ad Litem Training 2017* can help you navigate the twists and turns of being an effective guardian. **Register now!**

## Can't make any of the dates this spring?

Mark your calendar for two winter webcast replays:  
**November 17, 2017** and **December 14, 2017.**

## Schedule

**8:00 AM Registration**

**8:30 AM Adult GAL Basics**

- Handling an initial guardianship/protective placement case from appointment through payment
- Navigating a temporary guardianship
- Conducting an annual ("Watts") review  
*Gretchen G. Viney*

**9:45 AM Mediation v. Litigation: Dealing with Contested Guardianship Proceedings**

- What are the differences in both approaches, for lawyers and for clients?
- Timing considerations for deciding how to proceed
- Specific examples of what works, what does not, and at what cost
- How issues of capacity affect mediation and litigation
- What is the GAL's role in mediation and settlement negotiations?  
*Carol J. Wessels*  
*Rachel Monaco-Wilcox*

**10:45 AM Break**

**11:00 AM Mediation v. Litigation: Dealing with Contested Guardianship Proceedings (continued)**

**12:00 PM Lunch (on your own)**

**1:15 PM The Public Benefits Every GAL Should Know**

- Overview of several important state public benefit programs and the program eligibility standards

- Why GALs need to include public benefit considerations in their recommendation and investigation
- The role public benefits play when determining least restrictive placement  
*Avery J. Mayne*

**2:15 PM Interviewing Skills for the GAL: Compassionate Communication**

- Best practices for talking with older adults, including people with dementia, mental illness, disabilities, and other impairments
- How to ensure your annual GAL visit with the ward does not cause more harm than good
- Tips for digging deeper when you fear abuse may be occurring  
*Kate Schilling*

**3:15 PM Break**

**3:30 PM Ethical Issues Involving Pro Se Guardianships and Other Unrepresented Parties**

- Ethical principles regarding interactions with unrepresented parties
- Dealing with unrepresented petitioners in guardianship cases
- Understanding the expectations of the appointing court  
*Robert T. Pledl*

**4:30 PM Program Concludes**

*Following program start time, webcast replay schedule will vary slightly from above listed times.*

## Faculty

### Program Chair

**Jessica A. Liebau**

Wessels Law Office LLC, Mequon

### Presenters

**Avery J. Mayne**

Walny Legal Group LLC, Milwaukee

**Rachel Monaco-Wilcox**

Rachel Monaco-Wilcox LLC, Richfield

**Robert T. Pledl**

McNally Peterson, S.C., Milwaukee

**Kate Schilling**

GWAAR Elder Law & Advocacy Center,  
Madison

**Gretchen G. Viney**

University of Wisconsin Law School,  
Madison

**Carol J. Wessels**

Wessels Law Office LLC, Mequon

## Location

### Live Seminar

**Madison, State Bar Center**

5302 Eastpark Blvd., American Center,  
(608) 257-3838

## Credits

This program has been submitted to the Wisconsin Board of Bar Examiners for up to **7.5 CLE/GAL Adult credits including 1.0 ethics and professional responsibility credit.**

The live seminar and live webcast on Thursday, May 11, 2017 will also be submitted for Minnesota credit.

## Book Sale!

### Save 20% on *The Guardian ad Litem Handbook*

Save 20% on *The Guardian ad Litem Handbook*. Just enter discount code **CA2585** at checkout if ordering online or mention it to customer service if you call in your order to (800) 728-7788.

**Seminar registrants receive a two-week free trial of the Books UnBound® version of this title.**

*The Guardian ad Litem Handbook* takes a holistic approach to representing your clients' best interests, providing summaries of a guardian ad litem's duties and powers, practical explanations of court procedures, and detailed information on "the human side" of your role, from attachment to long-term support services. Whether you're looking for guidance on the basics of being a GAL, or you need help with the most complex issues, you'll find it in this *Handbook*.

**Print Book:** #AK0057; 700+ pp.; 4th ed. 2012 (Includes 2016-17 supplement)

**Member:** ~~\$179~~ \$143.20 | **Nonmember:** ~~\$229~~ \$183.20

**Books UnBound® Subscription:** # AE0057

**Member:** ~~\$159~~ \$127.20 | **Nonmember:** ~~\$199~~ \$159.20

*Discount applies to both print and digital Books UnBound® editions of this title and cannot be applied to previous purchases. Offer valid as long as CLE credit is available for this program. For Books UnBound users, discount may be applied to purchase of individual Books UnBound title only and may not be used on purchase of full library.*



## Who should attend

- Guardians ad litem for adults
- Elder law attorneys
- Family law practitioners

## How you'll benefit

- Know how to handle a GAL assignment from initial appointment through payment
- Discover the differences between the GAL's role in both mediation and litigation in contested proceedings
- Understand the unique ethical duties of working with pro se petitioners and unrepresented parties
- Learn best practices for communicating with older adults
- Find out how to uncover suspected abuse during your GAL interview

## Additional Learning Opportunities

### WisPACT Update 2017

Familiarize yourself with best practices for reporting to the Social Security Administration and Medicaid. Understand the proper ways of decanting to a WisPACT trust. Plus, know how to best counsel clients considering a Special Needs Trust. **7 CLE**

**Webcast Replay:** April 27, 2017 | May 2, 2017 | May 10, 2017 | May 19, 2017 | May 22, 2017

### Guardianship and Protective Placement for the Elderly in Wisconsin

Be prepared to assist older clients when voluntary methods of care fail with help from this comprehensive guide to law and practice under the guardianship and protective placement statutes. Topics include choosing a guardian, role of the guardian ad litem, and safeguards under the protective service system.

**Print Book:** #AK0201; 236+ pp.; 4th ed. 2015; **Member:** \$89 | **Nonmember:** \$109

**Books UnBound® Subscription:** #AE0201; **Member:** \$159 | **Nonmember:** \$199

### Consumer Pamphlet Series: Guardians ad Litem – Answering Your Legal Questions

Help clients and potential clients understand the guardian ad litem's role in the divorce or paternity process with this easy-to-understand resource. This consumer pamphlet discusses how a GAL is appointed, the GAL's role, and much more.

**Pamphlet – Individual pack of 50:** #GC0093; **Member:** \$20 | **Nonmember:** \$25

**Electronic License – One-year subscription:** #GCLP20; **Member:** \$75 | **Nonmember:** \$95

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# Registration

**Online:** [www.wisbar.org/seminars](http://www.wisbar.org/seminars) » credit card or Ultimate Pass only

**Phone:** (800) 728-7788 » credit card or Ultimate Pass only

**Fax:** (608) 257-5502 » credit card or Ultimate Pass only

**Mail:** State Bar PINNACLE Registrations  
P.O. Box 7158, Madison, WI 53707-7158  
check, credit card, Passbook, or Ultimate Pass

**STATE BAR CLE/PINNACLE PASSBOOK REGISTRATIONS:** Passbook Certificates must be received by the State Bar at least one business day prior to the event. For live seminars, walk-in registrations with the Passbook Certificates are welcome.

**REGISTRATION CANCELLATIONS:** Please visit [www.wisbar.org/cancellation\\_policy](http://www.wisbar.org/cancellation_policy) for information on PINNACLE registration cancellation policies.

## Course materials for those attending the seminar

Course materials are provided to seminar attendees in PDF format and are downloadable from *myStateBar* on *WisBar.org* up to four days prior to and 90 days after your seminar. The PDF format is ideal for creating an electronic library that is easily stored, searched, and shared. PDFs allow you to search multiple files at once, copy and paste desired paragraphs, or send the entire PDF to a colleague without leaving your desk.

Use Adobe Reader, GoodReader for iPad, or another free downloadable program to access the files from your computer, tablet, or mobile device during the seminar to make notes electronically, or print relevant sections ahead of time.

For live seminar attendees who prefer to receive course materials in printed format, please select the tuition option that includes printed materials for an additional \$20. You will also have access to the PDFs to get the benefit of both options.

***This program is sponsored by:***



## Adult Guardian ad Litem Training 2017

Priority Code: S 3 4 4 5 B

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<input type="checkbox"/> State Bar Member	<input type="checkbox"/> \$239	<input type="checkbox"/> \$219	<input type="checkbox"/> \$249
<input type="checkbox"/> Nonmember	<input type="checkbox"/> \$319	<input type="checkbox"/> \$299	<input type="checkbox"/> \$329
<input type="checkbox"/> Ultimate Pass Subscriber	<input type="checkbox"/> \$20	<input type="checkbox"/> \$0	<input type="checkbox"/> \$0
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To purchase written course materials for those **not** attending this program, contact the State Bar at (800) 728-7788.

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