



# Adult Guardian ad Litem Training 2021

**Program dates start May 14. Register today!**

**7** CLE  
GAL Adult

# Adult Guardian ad Litem Training 2021

## Watts reviews and beyond

Get a plethora of tips for effectively advocating for adult wards with *Adult Guardian ad Litem Training 2021*. From a review of important basics like how to conduct a *Watts* review to a simulation of what a case looks like in practice, this year's program will provide a detailed picture of what's involved in a guardianship or protective placement matter for adults. Plus, you'll discuss special issues that a GAL can get pulled into and challenges that have arisen in the past year, such as COVID-19 affecting assessments of where the ward should live.

## How you'll benefit:

- Handle a guardianship or protective placement case from appointment through payment
- Anticipate critical issues at each stage of the process
- Gain the tools you need to ensure a ward's rights are recognized and honored
- Know what judges, commissioners, and corporation counsel want to see
- Understand how comprehensive evaluations work
- Examine the role of each party through a real-world scenario
- Earn the credits necessary to accept GAL appointments for adults

## Who should attend:

- Guardians ad litem for adults
- Elder law attorneys
- Attorneys representing adults with special needs
- Estate planning attorneys

**Register now!**

Anytime. Anywhere. *CLE OnDemand*.™

visit [www.wisbar.org/ondemand](http://www.wisbar.org/ondemand)

## Dates

### Live Webcast

Friday, May 14, 2021

### Webcast Replay

Friday, May 21, 2021

Thursday, May 27, 2021

Wednesday, June 2, 2021

Tuesday, June 8, 2021

Wednesday, June 16, 2021

Monday, June 21, 2021

Wednesday, June 30, 2021

Tuesday, July 13, 2021

## Credits

This program will be submitted to the Wisconsin Board of Bar Examiners for up to **7 CLE/Adult GAL credits**. It does not qualify for EPR credit.

## Registration

**ONLINE:** [www.wisbar.org/seminars](http://www.wisbar.org/seminars)

**PHONE:** (800) 728-7788

**FAX:** (608) 257-5502

**MAIL:** State Bar PINNACLE Registrations  
P.O. Box 7158  
Madison, WI 53707-7158

### State Bar CLE/PINNACLE Passbook Registrations:

Passbook Certificates must be received by the State Bar at least one business day prior to the event.

### Registration Cancellations:

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

### Course materials for those attending the seminar:

Course materials are provided in PDF format and are downloadable from myStateBar on [wisbar.org](http://wisbar.org) up to two days prior to and 90 days after your seminar.

# Schedule

## 8:30 AM Guardianship Basics

- Handling an initial guardianship/protective placement case from appointment through payment
- Navigating a temporary guardianship
- Conducting an annual (*Watts*) review  
*Blaine Patiño*

## 10:00 AM Break

## 10:15 AM The Comprehensive Report, Placements and Transfers

- Evaluation overview – nuts and bolts of the process
- Anatomy of a comprehensive evaluation
- Litigating initial placement issues
- What is a placement? – How to transfer the ward between placements  
*Victoria L. Davis Dávila, Megan Murray, Robert T. Pledl*

## 11:30 AM Guardianship Appointments – Who Can Serve as Guardian?

- Introduction to the types of non-family member guardians – volunteer guardians, corporate guardians, and attorney guardians
- Discussion on funding sources for guardianship fees
- Shared experiences of the court's expectations of non-family member guardians with regard to frequency of visits, involvement in inter-family issues, and more  
*Avery J. Mayne, Kate Schilling, Mary Till*

## 12:05 PM Lunch Break

## 1:05 PM The Ward's Rights

- During initial process (rights of "proposed wards")
- Post-appointment rights (rights of "wards")
- Right to counsel and due process protections
- Freedoms of religion, association, and beyond
- The right to make "bad" decisions  
*Jessica A. Liebau*

## 1:55 PM A View from the Bench: Best Practices for the GAL

- Best practices
- Court expectations of the GAL's appointment
- What they like to see
- Common issues that arise  
*Sarah Adjemian, Hon. Sandra J. Giernoth, Peter M. Navis*

## 2:45 PM Break

## 3:00 PM Guardianship Scrimmage – What Does a Case Look Like in Practice?

- Role play of a contested adult guardianship and protective placement action
  - ▶ Choice of guardian
  - ▶ Placement options
  - ▶ Ward's rights
- Demonstrations of advocacy from the perspective of the petitioner, adversary counsel, and GAL  
*Anne A. Devitt, Avery J. Mayne, Amy K. Greske*

## 3:50 PM Program Concludes

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

# Faculty

## Program Chairs & Presenters

### Jessica A. Liebau

Wessels & Liebau LLC, Mequon

### Avery J. Mayne

Walny Legal Group LLC, Milwaukee

## Presenters

### Sarah Adjemian

Washington County Register in Probate,  
West Bend

### Peter M. Navis

Assistant Corporation Counsel II,  
Walworth County Office of Corporation  
Counsel, Elkhorn

### Victoria L. Davis Dávila

Davis & Pledl, S.C., Milwaukee

### Blaine Patiño

Patiño Law Offices, Wauwatosa

### Anne A. Devitt

State Public Defender's Office (Ret.),  
Milwaukee

### Robert T. Pledl

Davis & Pledl, S.C., Milwaukee

### Hon. Sandra J. Giernoth

Washington County Circuit Court,  
West Bend

### Kate Schilling

Greater Wisconsin Agency on Aging  
Resources, Madison

### Amy K. Greske

O'Neill Elder Law LLC, Hudson

### Mary Till

Program Director, Life Navigators,  
Wauwatosa

### Megan Murray

Life Navigators, Wauwatosa

## Book Sale – The Guardian ad Litem Handbook



**SAVE 20%** on *The Guardian ad Litem Handbook*. \* Wisconsin's most comprehensive guide to being a GAL. Find essential information for handling the legal issues as a GAL and gain insight into understanding the human side of a case.

Use **discount code CA3138** when you order online at wisbar.org or by calling (800) 728-7788. **Plus, all seminar attendees receive a free two-week trial of the Books UnBound® version.**

**Print Book:** #AK0057; 742+ pp.; 5th ed. 2018-19 (Includes 2020-21 supplement)

**Member:** ~~\$200~~ \$160 **Nonmember:** ~~\$250~~ \$200

**Books UnBound® Subscription:** #AE0057\_SUB

**Member:** ~~\$180~~ \$144 **Nonmember:** ~~\$225~~ \$180

*\*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.*

## Additional Learning Opportunities

### Wispect Update 2021

Get up-to-speed on the latest issues affecting SNTs. Receive a valuable case law update. Be able to explain financial tools to your clients. Know how to address ethical concerns that could impact your practice. **7 CLE | 1 EPR**

**Webcast Replays:** April 30, 2021 | May 7, 2021 | May 13, 2021 | May 19, 2021  
May 25, 2021 | May 31, 2021 | June 9, 2021 | June 17, 2021

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

A thorough guide to law and practice under the guardianship and protective placement statutes, with a primary focus on procedures under Wis. Stat. chs. 54 and 55. The temporary protective placement procedure under Wis. Stat. § 51.67 of the Mental Health Act is also briefly addressed. (Includes 2017-18 and 2019-20 supplements)

**Print Book:** #AK0201; 236+ pp.; 4th ed. 2015-16; **Member:** \$99 | **Nonmember:** \$125

**Books UnBound® Subscription:** #AE0201\_SUB; **Member:** \$150 | **Nonmember:** \$187.50

### Elder Law Forms Library

Find forms fast. Access more than 60 forms for motions, notices, petitions, orders, and more. Every form is an easy-to-modify template, follows statutory specifications, and ensures you include all required information.

**Online subscription:** # FB6000 | **Members only:** \$95/year  
(Discounts available on multi-user subscriptions.)

## Adult Guardian ad Litem Training 2021

Priority Code: **S 3 9 6 5 B**

SEMINAR TUITION	WEBCAST SEMINAR: With Downloadable (PDF) Course Materials
<input type="checkbox"/> State Bar Member	<input type="checkbox"/> \$259
<input type="checkbox"/> Nonmember	<input type="checkbox"/> \$339
<input type="checkbox"/> Ultimate Pass Subscriber	<input type="checkbox"/> \$0
<input type="checkbox"/> Passbook Certificate User	<input type="checkbox"/> 1 Certificate

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