

Adult Guardian ad Litem Training 2024

Priority Code: **S 4 3 5 9 B**

SEMINAR TUITION	IN-PERSON SEMINAR	WEBCAST SEMINAR
<input type="checkbox"/> State Bar Member	<input type="checkbox"/> \$239	<input type="checkbox"/> \$269
<input type="checkbox"/> Nonmember	<input type="checkbox"/> \$319	<input type="checkbox"/> \$349
<input type="checkbox"/> Ultimate Pass Gold/Silver	<input type="checkbox"/> \$0	<input type="checkbox"/> \$0
<input type="checkbox"/> Ultimate Pass Bronze	<input type="checkbox"/> \$239	<input type="checkbox"/> \$0
<input type="checkbox"/> Passbook Certificate	<input type="checkbox"/> 1 Certificate	<input type="checkbox"/> 1 Certificate

IN-PERSON SEMINAR:

Thursday, May 23, 2024
Madison

WEBCAST REPLAYS:

- Friday, May 31, 2024
- Tuesday, June 4, 2024
- Thursday, June 13, 2024
- Monday, June 24, 2024
- Saturday, June 29, 2024
- Wednesday, July 10, 2024
- Friday, July 26, 2024
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- Tuesday, October 15, 2024
- Wednesday, November 20, 2024
- Friday, December 20, 2024

LIVE WEBCAST:

Thursday, May 23, 2024

Lawyer State Bar Member No. _____

Nonlawyer Profession _____

Name _____

Firm Name _____

Address _____

City/State/Zip _____

Phone Number _____

Email _____

PAYMENT: Tuition Amount Enclosed \$ _____

State Bar Passbook Certificate (enter certificate number) # _____

Check enclosed (payable to State Bar PINNACLE) _____

Ultimate Pass Gold Ultimate Pass Silver Ultimate Pass Bronze

VISA MasterCard American Express Discover Exp. Date _____

Card No. _____

Signature _____

NOTICE: By attending this State Bar event, you understand and agree that you may be photographed and/or electronically recorded during the event and you hereby grant to the State Bar the right to use and distribute your name and likeness for promotional or educational purposes without monetary compensation. The State Bar assumes no liability for such use.

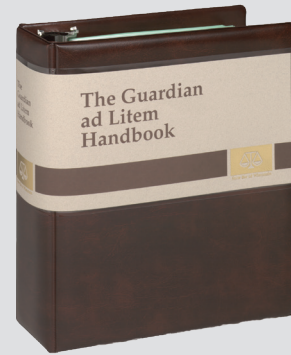
Mail to: State Bar PINNACLE Registrations
P.O. Box 7158
Madison, WI 53707-7158

Event Code: CA3631 M W R R2 R3 R4 R5 R6 R7 R8 R9 R10 R11 R12

Book Bonus!

The Guardian ad Litem Handbook

SAVE 15% on *The Guardian ad Litem Handbook*. * Discover invaluable contributions from authors with extensive expertise in GAL work in Wisconsin's most comprehensive guide to being a GAL. Use **discount code CA3631** when you order online or by calling (800) 728-7788.



*Discount applies to both print and digital Books Unbound editions of this title and cannot be applied to previous purchases. Offer valid through 12/31/25. For Books Unbound users, discount may be applied to purchase of individual Books Unbound title only and may not be used on the purchase of libraries. Discount cannot be combined with any other offers.

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Additional Learning Opportunities

CLE Seminars

Wispect Update 2024

Wispect Update 2024 is packed with insights on special needs trusts, SECURE 2.0 Act updates, Wispect Trusts, and Social Security, and more. Pick up tips on communicating with clients and explore the latest case law on issues affecting elder and special needs clients. **7 CLE/1 EPR**

Webcast Replays: Apr. 24, 2024 | May 7, 2024 | May 16, 2024 | May 24, 2024 | June 5, 2024
June 13, 2024 | July 2, 2024

Books / Books Unbound®

Advising Older Clients and Their Families – 2 Volume Set

Written and reviewed by more than 20 of Wisconsin's premier elder law attorneys, this is the foremost guide to elder law developed for Wisconsin practitioners. You'll find practice pointers, tips, charts, forms, and other tools essential to building and maintaining a successful elder law practice.

Print Book: #AK0187; Vol. I: 542+ pp.; 5th ed. 2021-22 | Vol. II: 748+ pp.; 5th ed.; 2022-23;

Member: \$425 | **Nonmember:** \$531.25

Books Unbound Subscription: #AE0187_SUB; **Member:** \$347 | **Nonmember:** \$415

Online Fillable Forms

Elder Law Forms Library

Find the forms you need fast with access to more than 60 forms for motions, sample letters, notices, petitions, orders, and more. Every form is an easily modified template, follows statutory specifications, and ensures you don't miss any required information.

Online subscription: #FSFB6000 | **Members only:** \$105/year

(Discounts available on multi-user subscriptions.)



STATE BAR OF WISCONSIN

P.O. Box 7158, Madison, WI 53707-7158

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Madison

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Adult Guardian ad Litem Training 2024

7 CLE
GAL Adult
1 EPR

Program dates start May 23. Register today!

Adult Guardian ad Litem Training 2024

Get your GAL guidance

Adults in need of a guardian ad litem (GAL) depend on someone with the knowledge and insight it takes to protect their best interests. **Adult Guardian ad Litem Training 2024** explores a range of skills every GAL should know in guardianship and protective placement cases. You'll receive the tools, guidance, and GAL credits you need to serve as a court-appointed GAL for adults. Benefit from a helpful overview of an initial guardianship or placement case, then delve into the GAL's role in *Watts* reviews, guardianship transfers, hearings, litigation, and more.

How you'll benefit:

- Confidently handle guardianships and protective placements from appointment through payment
- Know how to conduct an annual *Watts* review
- Understand the GAL's duties under the Uniform Adult Guardianship and Protective Proceedings Jurisdiction Act
- Receive an overview of IRIS, Wisconsin's self-directed adult long-term care program
- Effectively prepare for contested guardianship hearings
- Survey the landscape of residents' rights and regulatory oversight in skilled nursing facilities
- Explore ethical considerations specific to adult GAL matters

Who should attend:

- Guardians ad litem for adults
- Family law attorneys
- Elder law attorneys
- New attorneys looking to take GAL appointments
- Experienced GALs who want a refresher
- Judges in guardianship and protective placement matters

Register today!

Schedule

8:00 AM Registration

8:30 AM Guardianship Basics

- Petitioning for guardianship and protective placement from start to finish
- In depth review of statutory requirements, including notice and evidentiary requirements and key players
- Conducting guardianship/protective placement hearings
Avery J. Mayne

9:20 AM GAL Basics

- Handling an initial guardianship/protective placement case from appointment through payment
- Navigating a temporary guardianship
- Conducting an annual (*Watts*) review
Patricia R. Foley

10:10 AM Break

10:25 AM Guardianship Transfers

- Review the Uniform Adult Guardianship and Protective Proceedings Jurisdiction Act
- Transfers TO and FROM Wisconsin
- GAL duties under the statute
Blaine Patiño

11:15 AM An Introduction to IRIS – Wisconsin's Self-Directed Adult Long-Term Care Program

- Overview of the Wisconsin IRIS Program for GALs: eligibility, enrollment, and allowable services
- Examine the additional key players in IRIS: Fiscal Employer Agency (FEA), Aging and Disability Resource Center (ADRC)
- Comparing IRIS and Family Care: primary similarities and differences
Melanie Cairns

12:05 PM Lunch (on your own)

1:15 PM Contested Issues in Guardianships – What the GAL Needs to Know

- "Frequent flyer" contested guardianship issues
- How to be prepared for your contested hearing
- GAL responsibilities in litigation
- Guardianship and protective placement motion practice
Victoria Davis Davila

2:05 PM Coordinating Guardian ad Litem Responsibilities and Residents' Rights

- The guardian ad litem's role and responsibilities regarding coordination of self-determination and due process rights for long-term care residents
- Scenarios related to laws, processes, and rights when conflicts arise over health care and quality of life decisions
- Advocacy services of the Board on Aging and Long Term Care's Ombudsman Program when working pre-emptively to resolve conflicts for older adult residents in long-term care settings
Kim Marheine, Polly Shoemaker

2:55 PM Break

3:10 PM Guardian ad Litem: Ethical Considerations

- Formal Ethics Opinion EF-23-02 and implications for adult GAL matters
- *Tamara L.P., Jennifer M.*, and other relevant cases
- SCR Chapter 36 vs. SCR 20:1.2 "competent representation" of best interest
Jessica A. Liebau

4:00 PM Program Concludes

Following start time, 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

Melanie Cairns

Disability Rights Wisconsin
Madison

Kim Marheine

Board on Aging & Long Term Care
Madison

Victoria Davis Davila

Davis & Pledl, S.C.
Milwaukee

Blaine Patiño

Canellos & Patiño LLC
Wauwatosa

Patricia R. Foley

Law Office of Patricia R. Foley LLC
Madison

Polly Shoemaker

Greater Wisconsin Agency on Aging Resources
Madison

Dates Location

In-Person Seminar

Thursday, May 23, 2024
State Bar Center
5302 Eastpark Blvd.
Madison, WI
(608) 257-3838

Live Webcast

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Webcast Replays

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Credits

ATTORNEY CREDIT: This program will be submitted to the Wisconsin Board of Bar Examiners for **7 CLE/GAL Adult credits including 1 Ethics and Professional Responsibility credit.**

JUDICIAL CREDIT: This program has been approved by the Wisconsin Office of Judicial Education for **2 Judicial Education credits.**

Registration

ONLINE: 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. For in-person seminars, walk-in registrations using Passbook Certificates are also welcome.

Registration cancellations: Please visit wisbar.org/cancellations 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 up to two days prior to and 90 days after your seminar.

COVID-19 safety information: Complete and current safety guidelines can be found at wisbar.org/covidsafety.

