



A monthly newsletter brought to you by Texas Guardianship Association

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**TGA 2022 Annual Conference –  
It's a Wrap!**

There are a lot of TGA members who have attended TGA conferences over the past thirty years – some of you have been around longer than I have and I began with TGA in the mid-1990's.

There are some conferences that are particularly memorable.

I remember well when the National Guardianship Association had scheduled its annual conference in Del Rey Beach, Florida, in early October of 2001. I was past president of NGA, and the September 11 attacks had just occurred. On September 12, for the first time in over a century, there were no aircraft in the sky.

The Board of Directors had a difficult decision to make. Should we cancel the conference? If so, there would be financially devastating penalties. Should we keep the conference in Del Rey Beach, and hope for the best? At the time there was the very real sense that our members could be at risk in attending the conference, especially since a number of the terrorists who carried out the attacks were from Del Rey Beach.

The NGA Board decided to stay the course and hold the conference. Our attendance was about one-half of the usual attendees; however, to this day, everyone who was there remembers the sense of togetherness and very real appreciation we felt from being together at that moment in time.

I believe the 2022 TGA conference at Moody Gardens in Galveston will fondly be remembered in the same way. TGA had to cancel its planned 2020 conference at the Fort Worth Hilton due to the World Health Organization declaring a global pandemic just several weeks before the beginning of the conference. The facility wanted to charge us a \$65,000 cancellation fee but we were able to reject their demand due to an artfully-crafted clause in our hotel contract that allowed cancellation with no penalty in the event of a global pandemic being declared by WHO.

Our members stuck with us through virtual conferences in 2020 and 2021 (we were able to also cancel our contract with the Austin Crowne Plaza in 2021), which proved to be less than ideal but provided sufficient resources to keep TGA financially solvent.

Continued on next page....



# EXECUTIVE DIRECTOR'S REPORT

## TGA 2022 Annual Conference – It's a Wrap!

Continued

We had booked Moody Gardens in 2019 before there was any notion that there could be a pandemic that would shut everything down. The TGA Board faced the same issues that had perplexed the NGA Board twenty years ago: should we cancel the conference? If so there would be financially devastating penalties. Should we keep the conference in Galveston, and hope for the best?

The TGA Board has consistently and confidently led the organization toward a remarkably successful conference in Galveston. In fact, at its retreat last November the Board unanimously voted to schedule the 2023 annual conference at the Embassy Suites in Denton.

So, that brings us to the conference last month at Moody Gardens. TGA Board member Louis Stefanos has commented that, out of four live conferences he has recently attended, TGA's was the best attended. Our attendance was down by about 50 attendees, but we had 200 paid attendees and another 20 sponsors and exhibitors present.

Of course, the conference would have never been possible without crackerjack efforts from conference planners Terri Breon and Keith McNally, and our conference committee chaired by Courtney Carey. The conference agenda was packed with outstanding sessions and very talented presenters.

TGA Administrative Assistant Denise Maggard handled the logistics of conference registrations and coordination with sponsors and exhibitors. Anna Nava and Claudia Gonzalez, who had been instrumental in making the last live conference in 2019, were on the front lines at the registration desk again. They were joined by staff from Denton County MHMR and Fort Worth TGA member Elizabeth Hart.

Amazingly but not surprisingly, when registrations began in the late afternoon of April 5, everything was ready to go!

The conference began with a bang with Dr. Tam Cummings providing back-to-back opening keynote sessions on dementia. More people than I can count have commented that this was the best presentation they have seen. Other highlights include the opening reception sponsored by Prudent Investors, the luncheon and presentation provided by the Merrill Lynch Special Needs Team (which was also the Blue Diamond Conference Underwriter), the silent auction that was coordinated by Claudia Gonzalez and the Harris County Guardianship Program, and the live auction that was coordinated by Eman Nachawati, Elizabeth Hart and Claudia Gonzalez. Our thanks go out to everyone who donated items for the auctions and those who bid on the auction items. Both auctions raised a record high of \$10,000.00 for TGA.

Speaking of records, I have to thank Steve Fields and "Guardians of the Groove" for donating record sales from their exhibit table, which resulted in \$615.00 in proceeds to TGA.

Following the live auction we were entertained by Curt Shannon and his band "Moment of Truth" along with guest vocalists Karen Fonville and Steve Fields.

There is so much more that I could cover – but instead I'll ask you to enjoy the photographs from the conference that have been included in this newsletter. The photos were taken by Stan Hart, husband of TGA member Elizabeth Hart, and they tell the story of the conference better than words.

We look forward to seeing you at the Denton Embassy Suites from April 18-21, 2023.

In the meantime, please keep an eye out for some great educational online webinars and other opportunities in the TGA newsletter, Facebook page, and on the TGA website.





# TGA CONFERENCE RECAP





# TGA CONFERENCE RECAP



*That's a wrap!*



# TGA CONFERENCE RECAP



## From the National Guardianship Association President



(Left to right TGA Executive Director Terry Hammond, TGA President Catherine Vergara, NGA President Anthony Palmieri)

As President of the National Guardianship Association, I wanted to share a Texas-sized “congratulations” on your success at the Texas Guardianship Association’s Annual Conference in the Oleander City. The content of the programming was outstanding and the energy from speakers, board members, exhibitors, and attendees was invigorating. From the bottom of my heart, I am extremely appreciative for allowing me the opportunity to share a message of thanks at the conference.

Throughout the state of Texas, and from our nation’s sea to shining sea, all TGA and NGA members share a common connection, which is “good, ethical and benevolent guardianship protects persons needing protection.” In my guardianship role, I can “tell it like it is” and also advocate for continual improvements at the same time. All guardianship systems can be improved and I can unequivocally proclaim that the overwhelming majority of guardians perform honorable and admirable work in often complex, difficult, and stressful circumstances. In my experience, guardian’s work is far too often marginalized and underappreciated. At the same time, public discourse about guardianship in the media is seldom well-balanced and rarely accurately reflects what is actually occurring in guardianships.

This inconsistency is one reason why I am taking the time and making the effort to thank, in person, as many guardians and NGA members as possible. In the coming weeks and months, I plan to share a message of thanks to all NGA members and future members in Missouri, Arizona, Michigan, Illinois, Ohio, Washington, Tennessee, and hopefully other states. Your phenomenal conference in the Lone Star State was the first in-person conference on my 2022 state affiliate conference circuit and you set the bar high. During these upcoming events and because of my perspectives and experiences in guardianship, I plan to highlight a message about guardianship that is often ignored by state legislators, agency heads, and news media. I’ve encapsulated this message into four social media ready hashtags.

**#SilverCollarCrimes:** Too often, the court is forced to appoint a professional or public guardian because the person with diminished cognition was previously exploited or abused by a loved one. The court expects the guardian to stop the exploitation and claw-back the ill-begotten funds from the family member. The guardian is instantaneously thrust into a hostile, awkward and poisonous environment from the get-go. Once the guardianship is established, family exploitation, discord, and dysfunction often adversely impacts the proceedings. The public should know that elder persons are exponentially more at risk to be exploited and abused by a family member than a professional guardian.

Continued on next page....



# TGA CONFERENCE RECAP

**#PublicGuardianFunding:** Public and professional guardian programs need to be appropriately funded and guardians need to be compensated fairly and reasonably. Guardians should be paid commensurate their education, experience, and expertise, along with the complexity of the guardianship and results of the services. Public policies must match state appropriations and forced “pro bono” guardian appointments should be banned. Forcing a guardian to take a case and be appointed to a case is poor public policy, and solving one-problem creates other problems by masking public guardian funding deficiencies.

**#GuardianshipDataTransparency:** Guardianship data should be collected and analyzed by an independent entity (not a vested stakeholder or a decision-maker). Appropriate data should be shared with decision-makers, legislators, and the public while protecting the privacy rights of protected persons. Once collected, I am betting that the data will empirically reveal that the vast majority of guardians are doing fantastic work and the bad stories being sensationalized in the media are truly anecdotal. I also expect guardians to embrace data-driven reforms to improve guardianship.

**#CertifiedGuardianshipInvestigator:** Guardianship investigators, auditors, reviewers, monitors, and visitors, law enforcement officers, adult protection investigators, and prosecutorial staff need to learn how to be diligent and skeptical while also being empathetic to good, ethical, and benevolent guardianship. Guardianship is unlikely any other legal proceeding or social service and requires special skillsets. I am asking the NGA to develop a national certification pilot program to specially train and educate auditors, investigators, and monitors regardless of their local, state, or federal jurisdiction.

If you are an NGA member or thinking about becoming an NGA member, the NGA website has a lot of amazing information about the National Conference on Guardianship in Dallas on October 22-25, 2022, professional enrichment webinars and bi-monthly coffee chats that are no cost to NGA members, along with our new and improved newsletter (family exploitation will our focus for the Spring edition), discounts on liability insurance and other networking and educational opportunities.

**[www.guardianship.org](http://www.guardianship.org)**

On behalf of the National Guardianship Association, thank you for your passion and dedication to serving significantly incapacitated persons who need our protection and our services. Thanks again for letting me participate at your conference in historical Galveston, and I hope to see you in Dallas. Please feel free to join the national conversation, connect with me via social media and follow my progress on spreading the fact that “good, ethical, and benevolent guardianship protects people needing protection.”



**Anthony Palmieri, JD, CFE, CIG, CIGI, CIGA, CGI, CIA, CCSA**  
NGA President  
Deputy Inspector General &  
Chief Guardianship Investigator  
Division of Inspector General  
[apalmieri@mypalmbeachclerk.com](mailto:apalmieri@mypalmbeachclerk.com)



# CONFERENCE SPONSORS & EXHIBITORS

## UPCOMING WEBINARS

### Sponsors and Exhibitors

TGA recognizes its 2022 Conference Sponsors and Exhibitors for their commitment to excellence in guardianship and adult protection, and thanks them for their financial support for TGA and their presence at our conference.

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*Thank you Sponsors and Exhibitors!*

2022 Annual Conference • Moody Gardens Hotel • Galveston, Texas • April 5-8, 2022

## UPCOMING WEBINARS



### ***AGING, DEMENTIA, AND CAPACITY; A PHYSICIAN'S PERSPECTIVE***

**Speaker:** Martha E. Leatherman, M.D., is a physician certified in adult and geriatric psychiatry by the American Board of Psychiatry

**June 14, 2022**

1:00 p.m.-2:00p.m.

1.0 CE – Approved

1.0 CLE – Approved

**REGISTER  
HERE**

### ***THE ARC OF TEXAS MASTER POOLED TRUST- HOW POOLED TRUSTS CAN BE A GREAT ALTERNATIVE***

**Speaker:** Haley Greer, Esq. - the Director of The Arc of Texas Master Pooled Trust (MPT)

**June 28, 2022**

1:00 p.m.-2:00p.m.

**\*Registration and Credit Pending**



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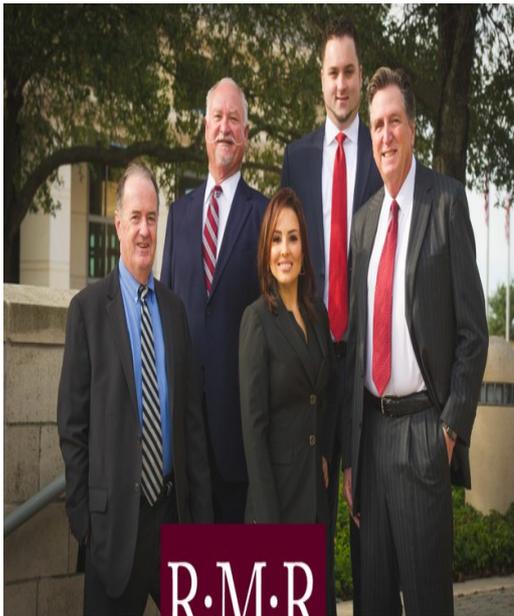
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# 2023 TGA CONFERENCE

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**Tuesday, April 18 – Friday, April 21, 2023**



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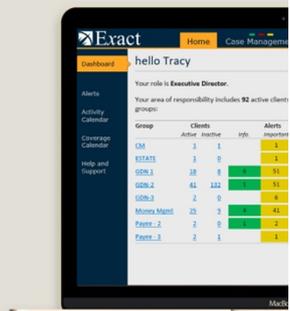
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# TGA NEEDS YOUR HELP

As part of our newly reworked and expanded TGA website, we have begun to hold regular webinars for those needing continuing education credits.

To effectively compile the information that we'd like to provide, **WE NEED YOUR HELP!**

1. Send us suggestions for guardianship topics you'd like to know more about, as well as the names of any presenters that you'd like to hear from. To suggest a topic or presenter (or to volunteer to make a presentation), please email Terry Hammond at [terry@texasguardianship.org](mailto:terry@texasguardianship.org).
2. Consider joining the Education Committee as we seek out resources, programs, and explanations for issues which challenge us all when working with guardianships. For information about the TGA's Education Committee, please email Anna Torres at [anna@annatorreslaw.com](mailto:anna@annatorreslaw.com).

Anna Torres & Marie Portales Rodriguez, Education Committee Co-Chairs



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# UPCOMING OFFERINGS



## 2022 TGA GUARDIANSHIP LAW & ETHICS REVIEW DATES

REVIEWS ARE BENEFICIAL IN STUDYING FOR THE UPCOMING JBCC EXAM

### UPCOMING DATES

- August 12
- November 29

All review sessions will be live via Zoom



## 2022 JBCC GUARDIANSHIP CERTIFICATION EXAM DATES

- August 23, registration deadline August 3
- December 6, registration deadline November 16

All testing will be online.

Link to Exam procedures - <https://www.txcourts.gov/jbcc/guardianship-certification/exam/>

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# MEDIATION TRAINING

## Guardianship Mediation Training

Sponsored by the Office of Dispute Resolution for Lubbock County and  
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**September 27 - 29, 2022**

8:00 a.m. - 5:00 p.m.

Holiday Inn Express Salado-Belton

1991 N. Stagecoach Road

Salado, Texas 76541

Early Bird \$375 (by August 26th) | Regular \$475

Join us for the **ONLY TGA sanctioned Guardianship Mediation Training in the State of Texas and the first to be approved by JBCC!**

Continuing Education Credits for this learning activity will be awarded by Texas Tech University, Office of the Provost.

Class size is limited to 18 participants. **Must have completed the Basic Mediation Training and provide certificate at the time of registration.** Preference will be given for those knowledgeable about various aspects of guardianship, geographic diversity, and mediation experience. After selection by the Texas Guardianship Association, attendees may be required to authorize completion of a criminal background check.

**This course has been approved for MCLE credit in the amount of 24 hours, of which 3 credit hours will apply to legal ethics/professional responsibility credit.**

**Approved by JBCC for Guardians for 24 total hours (20.5 non-ethics, 3 ethics, 0.5 legislative updates).**

**A Room Block with Guaranteed Rates is being negotiated at the Holiday Inn Express Salado-Belton. Please call (254) 947-4004 to make a reservation. Deadline is August 26, 2022.**

[Click here to register](#) or scan the QR Code.



SCAN ME

If paying by credit card, you will receive a confirmation email with a link. Otherwise, please make checks payable to:

Lubbock County Office of Dispute Resolution  
P.O. Box 10536  
Lubbock, Texas 79408

Fee includes program materials, CLE credits, and light refreshments. The fee does not cover lunch or lodging.

**Space is limited and not guaranteed until payment is received. A PO number will be considered as payment.**

**Cancellation Policy:** Written cancellation must be received ten business days prior to the beginning training date. Cancellations received before this date are subject to an administrative fee. Cancellations after this date will receive no refund. Substitutions may be designated with notification to our office. We reserve the right to cancel training if sufficient enrollment is not met, and will refund registration fee for cancelled training. **Special Accommodations:** Persons with disabilities who may need auxiliary aids are requested to contact our office at least three days in advance to make appropriate arrangements.

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Participants have the chance to mediate disputes at the Office of Dispute Resolution for Lubbock County on Friday afternoon, May 20th. This opportunity is unique to the Lubbock Basic Mediation Training class (proper business attire required).

*This course has been approved for Minimum Continuing Legal Education credit by the State Bar of Texas Committee on MCLE in the amount of 40 hours, of which 3 credit hours will apply to legal ethics/professional responsibility credit.*

### Registration Fee:

\$525 Early Bird (by April 14th) | \$575 Regular | \$625 At Door

Student & Government Employee Rate: \$475

Deduct \$25 from fee if referred by a past participant.

[Click here to register](#) or scan the QR Code.



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The Texas Guardianship Association is a non-profit organization and an affiliate of the National Guardianship Association.

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# ATTENTION PLEASE!

**2021 Memberships have expired! The 2022 Membership link is now open. Please renew your membership and share the link below with others who may be interested in joining TGA.**

**CLICK HERE!**

## PUBLIC POLICY ANNOUNCEMENT

By Brian Hill, Public Policy Committee Chair

**Have you ever seen a guardianship statute that you felt was unfair, or needs an update to conform to practice in modern times?**

Come join the public policy committee. We are accepting ideas, thoughts, and potential changes to legislation for the 2023 Legislative Session.

If you'd like to join this committee, please e-mail [brian@brianhillattorney.com](mailto:brian@brianhillattorney.com).



# TGA NEWSLETTER ADVERTISING

## NEWSLETTER ADVERTISEMENT

TGA is pleased to offer advertising to our members and to those who wish to connect with the guardianship community in our monthly newsletter.

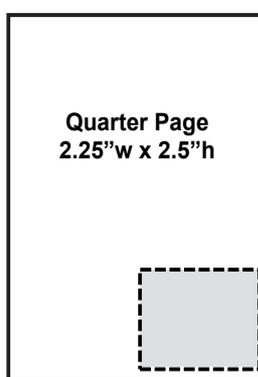
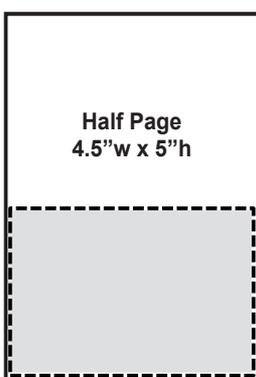
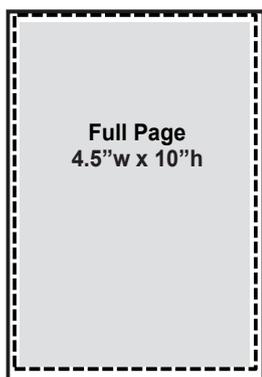
We encourage you to consider advertising in our newsletter, and to invite your colleagues to advertise as well. Click [HERE](#) to advertise.



## Newsletter Advertising: TGA Monthly Newsletter

### RATES FOR TWELVE ISSUES

	Member Full Year (12 issues)	Non-Member Full Year (12 issues)
Full Page 4.5" wide X 10" high	\$500	\$650
Half Page 4.5" wide X 5" high	\$275	\$425
Quarter Page 2.25" wide X 2.5" high	\$170	\$260



### Newsletter Ad Specifications

Ad rates are quoted for color copy. Black & white can be substituted, but there will be no reduction in rates.

To qualify for quoted rates, ads must be submitted in final form using one of the following formats: (Documents created on the MAC platform can only be accepted as a PDF.)

- High resolution TIF or JPG (Must be 300 dpi or higher.)
- PDF created in Acrobat Distiller, not PDF Writer. (Provide a high-resolution PDF file and embed the fonts.)
- Production-ready hard copy. (This will be scanned, and reproduction quality cannot be guaranteed.)

**Enlarging or reducing existing ads:** For best results, submit ads that are properly sized. It is not possible to guarantee reproduction quality when enlarging or reducing existing ads, especially those that contain screens or photos. For optimal quality, digital ads must be at least 300 dpi. Production-ready hard copy ads with screens or half-tones are especially prone to reduced quality when enlarged or reduced. TGA is not responsible for reproduction quality of an ad that is below standards.

#### Acceptance Terms for All Advertising:

Ads must be production-ready to receive quoted rates

Payment due before ad is published

No refunds granted for cancellation of ads after the stated deadline for publication