

# FSGA BULLETIN



**FSGA Mission Statement** - The Florida State Guardianship Association is dedicated to the protection of the dignity and rights of incapacitated persons and to increasing the professionalism of guardianship through education, networking and legislative action.

**CONFERENCE VIDEO LINK ►►**

## THANK YOU GUARDIANS

**F**SGA's 35th Annual Conference was a huge success drawing 300 in- person attendees and over 150 attending virtually. "It was a very successful event and it's because of the amazing educational program," said Executive director, Gina Rossi Scheiman. The event brought together hundreds of guardians for discussion, networking and in depth learning on crucial guardianship issues. "This event has been the most informative and best put together so far; every year they get better and better." said Bambi Williams, Professional Guardian.

Thank you to our presenters and our generous sponsors who supported us this year!



# MEET FSGA NEW PRESIDENT Lennie Burke



**D**ear Friends,  
I'm excited about the opportunity to build on the great work of the Association and to help it grow and evolve. Thank you for the opportunity to serve as your President

We've just completed our 35th annual conference. I have two observations. First, 35 years of successful conferences is remarkable. Some of you weren't born yet at the time of the first conference. This is an incredible record. Second, it's even more impressive that we have not only survived the worst pandemic of our lives but thrived despite it.

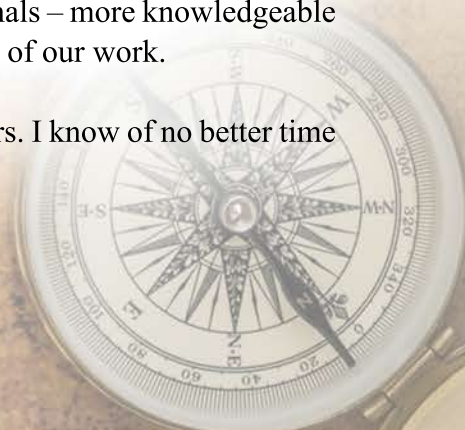
The success of all our conferences has resulted from the work of many volunteers. Those volunteers have been successful because they come from a community of energetic, creative problem solvers, the kind of people who work in guardianship. Thank you.

During my time as President, I want to build on the great work of the Association. One priority is in the area of public policy. The efforts of your past President, Carlos, your Executive Director, Gina, and other volunteers have been incredibly effective. Our Association has made an essential impact on legislation during the past year. There is more to do, and we are on a good path.

The second priority I have is to continue to enhance our educational offerings. They are already world-class. We'll continue to press for more and more effective education for guardians and the education of all those involved in our critical work.

Thirdly, this past year, your Board of Directors committed to expanding our efforts in making others – the public, elected leaders, the media, and related professionals – more knowledgeable of guardianship, the needs of endangered individuals, and the value of our work.

I have been involved in the leadership of the FSGA for eighteen years. I know of no better time





# BRINGING CRIMINALS TO JUSTICE



**T**he public does not realize that many guardianships are established because of abuse or exploitation of the vulnerable person. Often those who exploit the elderly are free of consequence. Losses are rarely recovered for the ward. In a case that started with a DCF investigation in 2013, almost 10 years later, Broward Guardian, Cindy Kramer sees justice for her ward. On a case where she spent years advocating, the convicted felon was finally found guilty of exploitation of the elderly, theft from the elderly and organized scheme to defraud.

Protection and advocacy from guardians make a huge impact in peoples, lives for the better!

Tell us your guardianship victory! [EMAIL US](#)  
#allinadayswork #tellyourstory #stopelderabuse #eldercare.



*SEE VIDEO with Cindy Kramer*



# LISTSERVE



Several have already opted-in earlier this year to the Members Only Listserv benefit when renewing (or joining) as an FSGA Member. This promises to be a great resource for everyone and invaluable as more members opt-in and participate so please do take advantage.

A Listserv service is in essence an email group where information of interest can be regularly shared, and in particular questions can be asked and helpful responses provided. Though different, somewhat comparable was the sharing of information through the use of the WHOVA platform during the FSGA Conferences that so many have used previously.

The FSGA Listserv will allow you to easily and conveniently collaborate with others, have discussions, and especially obtain answers to question you are bound to have. Brief examples include obtaining a recommendation for another professional (guardian/attorney) elsewhere, even in another state or country; for appraisers and for all kinds of items from A to Z; or particular questions on processes in a given Judicial Circuit, Clerks office, government agency, or a financial institution.

Other professional Listservs have a high level of collegiality that are extremely impressive. Best practices are also shared. Those we serve will be the definitive beneficiary besides each person participating.

With any listserv community there are general guidelines to follow. Please maintain client's privacy, avoid any potential ex parte communications, respect confidentiality and all others, and refrain from marketing and the selling of services. Use hypotheticals.

The disclaimer listed below will require your consent as you opt-in:

The Florida State Guardianship Association's (FSGA) Listserv is an instrument to facilitate member-to-member exchange of information consistent with FSGA's mission. The privilege of participating in this Listserv is limited to members of FSGA and it is voluntary. FSGA is not responsible for the content or accuracy of any of the messages transmitted and does not endorse the content or opinions stated. Postings to this list should not be considered legal advice, or factually valid. Users agree to act professionally and FSGA reserves the right to decline access to this Listserv.

**After joining you're ready to go and will be easy as you will not need to login again through the FSGA website. Also please see the following:**

- To keep these emails "organized" and also avoid going into Spam, establish a "New folder" in your email directory, perhaps title simply as FSGA Listserv.
- Then use the Rules feature to facilitate and automatically direct these emails into that folder. In MS Outlook you can find the Rules feature tab across the top ribbon. (Or, just Google "rules for directing emails".)
- State concisely and clearly the topic of your comments in the subject line. This allows members to respond more appropriately to your posting and makes it easier to search by subject.
- If you have several points to make, consider posting them individually in separate messages.
- All postings should add to the body of knowledge.
- Only send messages to the entire list when it contains information that everyone can benefit from. Send messages such as "thanks for the information" or "me, too" to individuals -- not to the entire list.
- Do not send administrative messages, such as "remove me from the list", through the list. You can change your subscription settings from your profile page. Administrative questions about the listserv, contact [Info@floridaguardians.com](mailto:Info@floridaguardians.com)

***JOIN LISTSERV***



# COMING SOON

## *4<sup>th</sup> Annual Ethics Symposium* *February 3rd, 2023 @ 9am*

FSGA's commitment to ethics continues with our 4th Annual Ethics Symposium. We welcome guardians' attorneys, court personnel, social workers, clerks, and many others to our program. Our dedicated 2 -hour virtual session highlights ethical issues faced by those practicing guardianship.

Sponsor our Ethics Symposium and tell our participants about your services! Contact FSGA for more information: [executiveoffice@floridaguardians.com](mailto:executiveoffice@floridaguardians.com)



# SAVE THE DATE

## **FSGA 36th Annual Conference**

**Rozen Plaza Orlando July 20th & 21st, 2023**

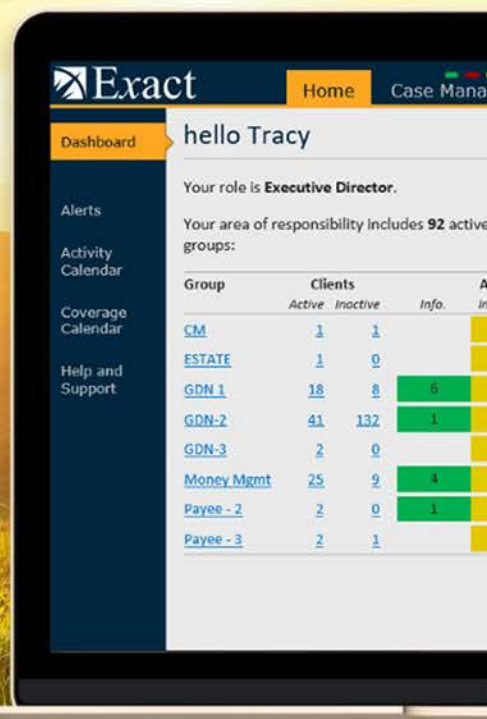


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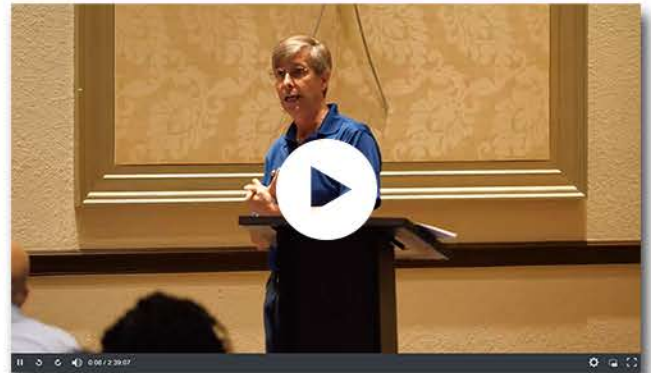
# NEW FSGA VIDEO LIBRARY

Please visit FSGA's online video library of courses approved for Guardian CEU.

If you are looking for a focused area of study or need a couple CEU's peruse our titles online:

- ***Professional Guardians' Interactions with Family, Friends and Interested Persons - Glenn Krasny***
- ***Conflict of Interest - Lance Mc Kinney, Esq.***
- ***Restoration of Rights – Enrique Zamora, Esq.***
- ***Fiduciary Duty - David Mangiero, Esq. and Mark Vernick***

**ACCESS COURSES HERE**



**LOGIN**

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**[floridaguardians.com/education/available-courses](http://floridaguardians.com/education/available-courses)**





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### Expert Tip: Use Check Lists

Ever gone to the store for bread and come home with two bags of groceries and no bread? This happens more times than we like to admit. In our busy lives, we are often distracted. That's the beauty of a checklist! By definition, "a checklist is a type of informational job aid used to reduce failure by compensating for potential limits of human memory and attention. It helps to ensure consistency and completeness in carrying out a task." So, if a checklist can ensure that we come home from the store with a loaf of bread, how can we apply the same idea to the business of guardianship?

We talk a lot about best practices in Guardianship, but without a tool to help put those practices into play—consistently—we are subject to the limits of memory and attention. Using software with a checklist feature

overcomes those shortcomings by providing the framework to create a work flow process and track activity progress. SEM Applications Guardianship Software provides customizable checklist options that display activity due dates on the calendar and provide reports to list outstanding items.

A good Checklist doesn't need to be elaborate; it needs to be duplicable. Create checklists for accountability in court required activities, to establish a progression for assigned tasks, and as a way to define company procedures. Check List items should be meaningful activities and actions or items that are critical to success. A checklist that is too long or complex to comfortably manage or one that includes items that are only rarely necessary will be frustrating to update and maintain. Conversely, a checklist that is vague or overly generalized may not provide enough direction to be helpful.

Start with one set of vital tasks or focus on a process that has court required activities or tasks that could be easily missed or forgotten. Order the tasks by priority and then refine the list to contain only items critical to success. For example, a New Client Checklist would only need to include a task to "Close existing bank accounts" rather than multiple tasks to "Close Checking account" and "Close Savings account". A task to "Marshall all assets" might prove to be too general. It might be wiser to include options for specific types of assets (i.e. cash assets, real estate, etc.).

With customization options, you can make course corrections as you go until you have a Checklist that fits your needs perfectly!

Interested in other expert tips? Visit [www.sem97.com](http://www.sem97.com) or call 660-446-3031 to learn more about the features of our guardianship software.



# GUARDIANSHIP SURVEY

Guardians, please take a few minutes to give us your input by completing the Guardianship Survey. We need your feedback on issues facing guardians so we can advocate on your behalf.



**IF YOU NEED ANOTHER REASON, THOSE WHO  
COMPLETE THE SURVEY CAN BE ENTERED  
INTO A GIFT CARD RAFFLE.**

**TAKE SURVEY HERE ►►**