

The Guardianship Event of the Year Is Here – And You Can't Afford to Miss It!

Get ready for the most anticipated gathering in guardianship and advocacy! The Florida State Guardianship Association Annual Conference brings together hundreds of professionals—both in-person and virtually—for two powerful days of cutting-edge education, dynamic discussion, and unmatched networking.

This year's program promises to be one of the most impactful yet. A distinguished panel of experts will lead an in-depth examination of one of the most influential and debated cases in guardianship history—the Terri Schiavo case. Their discussion will highlight the lasting lessons, ethical complexities, and legal precedents that continue to shape guardianship practices today.

Plus, attendees can connect with exhibitors, enjoy networking receptions and meals, and engage with speakers face-to-face. Whether you're on-site or tuning in through our cutting-edge virtual platform, this is more than a conference—it's a movement.

Join us and be part of the conversation shaping the future of guardianship.

EXPLORING NEW HORIZONS THROUGH EXPERIENCE AND DETERMINATION

FSGA 38TH ANNUAL CONFERENCE

Rosen Plaza Orlando Florida



2 JULY
24 & 25

Join the FSGA for our annual conference and the Florida Guardianship Foundation featuring it's Final Ethics and the Law installment. 11 CLE's and CEU's will be offered.

GUARDIANSHIP ETHICS COMPLEX CASES: LESSONS FROM TERRI SCHIAVO

Join us for an extraordinary full-day ethics training that delves into the complexities of guardianship and case management. Through the lens of one of the most pivotal guardianship cases in history—the Terri Schiavo case—we will explore the profound ethical challenges that continue to shape the field 20 years later. Gain valuable insights, and engage in lessons learned and thought-provoking discussions on the ongoing dilemmas.



George Greer - Retired Circuit Court Judge

Nationally recognized, presided over numerous Terri Schiavo case hearings. Served as Circuit Court Judge from 1992 until retiring in 2010 (6th Circuit, Pinellas and Pasco Counties).



George Felos, Esq.

Nationally recognized lead attorney for Michael Schiavo litigated other guardianship and related cases including before Florida's Supreme Court.



Hamden Baskin, Esq.

Martindale-Hubbell AV rated attorney served as Circuit Court Special Master hearing Baker Act cases. Trial counsel to Michael Schiavo.



Kenneth Goodman, PhD, FACMI, FACE

Founder and Director of the University of Miami Miller School of Medicine's Institute for Bioethics and Health Policy.



Ken Burke - Clerk of Circuit Court and Comptroller, Pinellas County.

Elected in 2004 at the height of the Schiavo case in his home county. Law firm Administrator, College Board Chairman and a CPA.



Patricia Fields Anderson, Esq.

Retired after more than 40 years as a litigator and appellate practice. Represented parents of Ms. Schiavo, and also has represented the St. Pete Times newspaper.



Robert Destro, Esq.

Professor at Catholic University of America's Columbus School of Law in Washington, D.C. Represented Florida Governor Jeb Bush and Ms. Schiavo's parents.



Ray E. Moseley, PhD, Associate Professor

Bioethics, Law and Medical Professionalism, Director of UF Shands Hospital Clinical Ethics Consultation Service and Chair of UF Shands Ethics Committee.



Katherine Drabiak, JD, Professor, Univ. of South Florida

Interim Department Chair, Health Policy and Systems Management at USF, colleague of Dr. Jay Wolfson, the special guardian-ad-litem in the Schiavo case.

Whova

DOWNLOAD WHOVA NOW

VIRTUAL OPTION AVAILABLE

Participate in the conference just like an in-person attendee through the WHOVA app!

SPONSORSHIP AVAILABLE

Gain attention of our attendees, while showcasing your commitment to guardians and exploring new horizons.

REGISTER TODAY



Our room block at the Rosen Plaza is FULL. We have secured a block of rooms directly across the street at the Rosen Pointe Inn at a reduced rate.

SECURE HERE

Join us a day early for our opening intensives July 23, 2025



The Mental Health Association of Central Florida's 4- Hour Guardian Advocate Training

This 4-hour Guardian Advocate Training is designed to equip participants with the essential knowledge and skills needed to serve as Guardian Advocates under Florida's Baker Act. take the post-test and receive the 4-hour Guardian Advocate Certification Training Certificate and Letter of Certification (this training also qualifies for 4 Guardian CEUs)

Available seating is limited. This session is free to all conference attendees.

EXPLORING NEW HORIZONS THROUGH EXPERIENCE AND DETERMINATION

FSGA 38TH ANNUAL CONFERENCE



[REGISTER HERE](#)

WEDNESDAY,
JULY 23RD

ROSEN PLAZA ORLANDO

JULY 24 & 25
Rosen Plaza Orlando Florida

Join Us for an Exclusive Training Day for Guardianship Examiners!

Join us for a day long educational seminar tailored just for examiners. 9700 International Dr, Orlando, FL 32819

This is a unique opportunity to network with fellow examiners, exchange ideas, and share valuable resources to enhance your practice. Don't miss this chance to grow your expertise and connect with other professionals in your field.

SCHEDULE

9AM-1PM 4-hour Initial Examining Committee Course with Lance Mc Kinney, PA
Rosen Salons

11AM-1PM 2-hour Update Course with Enrique Zamora, Esq and Dr Leonard Hock DO
Rosen Salons

****Lunch for all participants**

2PM-4PM Additional 2-hour session with presenters in depth look at issues such as becoming an effective expert witness, strategies to ensure timely payment for your services, Q and A and much more.
Rosen Salons

This is a unique opportunity to network with fellow examiners, exchange ideas, and share valuable resources to enhance your practice.

SPEAKERS



Dr. Leonard R. Hock, DO,
MACOI, CMD, FAAHPM



Enrique Zamora, Esq.



Lance Mc Kinney, PA

EXPLORING NEW HORIZONS THROUGH EXPERIENCE AND DETERMINATION

FSGA 38TH ANNUAL CONFERENCE



[REGISTER HERE](#)

WEDNESDAY,
JULY 23RD

1:00 - 4:00 PM ROSEN PLAZA ORLANDO

FSGA Offers Free 4-Hour Guardian Advocacy Training for Participants of the 38th Annual FSGA Conference.

Join us on July 23, 2025 for a valuable 4-hour Guardian Advocate Training session. This training is designed to provide participants with the essential knowledge and skills required to serve as Guardian Advocates under Florida's Baker Act.

The session will cover a comprehensive overview of the Guardian Advocate's role, focusing on how to protect the rights and well-being of individuals receiving mental health treatment. Participants will engage in interactive discussions and explore real-life scenarios, gaining practical insights and confidence in their responsibilities.

Upon completion of the training, participants will take a post-test and receive their 4-hour Guardian Advocate Certification, along with a Letter of Certification. This training also qualifies for 4 CEUs.

*Please ensure you have access to a cell phone, tablet, or laptop to take the test.

INSTRUCTOR



JAMILLAH CHANEY

Guardian Advocate Program Manager



Established in 1946, the Mental Health Association of Central Florida is a leading nonprofit dedicated to addressing mental illness and promoting overall mental health in the community. With 1 in 5 adults experiencing a diagnosable mental health condition annually, the Association focuses on promoting mental wellness and equitable access to care through services, support, and information for Central Florida residents.

Exclusive Training for Guardianship Examiners

A comprehensive training day led by experienced industry professionals, tailored specifically for guardianship examiners. These informative sessions are designed to elevate the members' knowledge, support their critical role in the guardianship process, and help them meet Florida's statutory training requirements.

EXPLORING NEW HORIZONS THROUGH EXPERIENCE AND DETERMINATION



FSGA 38TH ANNUAL CONFERENCE

23 JULY
2024 & 25

Rosen Plaza Orlando Florida

Reach Florida's Guardianship Leaders— Become a Sponsor or Exhibitor!

The Florida State Guardianship Association Annual Conference is the largest event of its kind, drawing hundreds of professionals—guardians, attorneys, fiduciaries, care managers, judges, and more—seeking the latest tools and resources.

This is your opportunity to showcase your organization to the people who need your services most. Build connections, boost your visibility, and be seen as a trusted partner in guardianship and advocacy.

Join us—your future clients will be there.

As Sponsors, your exposure is an essential part of the education and networking program. Our sponsorship comes with the state-of-the-art Whova app, which brings our in-person and virtual attendees together. Sponsors can set up a virtual booth, upload video, hold a showcase or demonstration, network with conferees and easily download contacts.

[Click here to secure your sponsorship](#)

Whova

Registration Now Open!



SPONSORSHIP LEVELS

FSGA 38TH ANNUAL CONFERENCE, JULY 24TH - 25TH

Peak Sponsor - \$9500.00

- Name and logo displayed during Speakers Reception/Karaoke
- Logo Cocktail napkins
- Hospitality Suite for duration of the conference
- Complimentary Suite for Two Nights
- Top placement/prominent signage
- Exhibitor package with most prominent booth display
- Newsletter Feature Article prior to the conference

Summit Sponsor - \$8000.00

- Name and logo displayed during Speakers Reception
- Hospitality Suite for duration of the conference
- Introduction and 5 minutes to address attendees
- Top placement/prominent signage
- Exhibitor package with prominent booth display
- Logo on Hotel Room Key Cards
- Newsletter Feature article prior to the conference

Trail Blazer - \$5,000.00

- Hospitality Suite use for the duration of the conference
- Name and logo displayed during Luncheon
- Introduction and 5 minutes to address attendees
- Top placement/prominent signage
- Company name and logo on advance materials and messaging
- Exhibitor package with prominent booth display

Pathfinder - \$3,500.00

- Name and logo displayed during Meal/break
- Introduction and 3 minutes to address attendees
- Top placement/prominent signage
- Company name and logo on advance materials and messaging
- Complimentary Exhibitor package
- Registration and meals for two

Sherpa - \$3,000.00

- Logo on Conference tote bags
- Company name and logo on advance materials and messaging
- Complimentary Exhibitor package

Rockface - \$3,000.00

- Sponsor of the Whova App - name tags
- Logo on App home screen
- Company name and logo on advance materials and messaging
- Complimentary Exhibitor package

Awards Reception (7.23.2025) - \$2,000.00

- 3-minute speaking spot at reception
- Prominent Signage
- Exhibitor Package

Base Camp - \$1,500.00 Exhibitors enjoy BOTH in person and virtual benefits with the Whova App

LIVE

- Skirted Table, chairs
- Two conference registration including meals and speakers' reception
- Company name and logo on advance materials and messaging
- Registration and meals for two

VIRTUAL

- Virtual Booth in Whova our conference app for both in person and virtual attendees
- Virtual interaction opportunities for weeks leading up the conference
- Ability to easily download conference/contact information
- Use of Whova App to create showcase, set up a product demonstration, upload video, schedule office hours for questions and so much more

Treeline - Form Sponsor - \$600.00

- Logo on all CEU forms

Ridgeline - \$150.00

- Logo or business name on a table stanchion
- A conference supporter pin to wear at the conference identifying your contribution

[Click here to secure your sponsorship](#)

Secure your Sponsorship online NOW at www.floridaguardians.com

Join us for FSGA's 38th Annual Conference and we look forward to the opportunity to showcase your company to 300 attendees - Florida's best in the field of guardianship, including guardians, attorneys, fiduciaries, court personnel, care managers, paralegals, nurses, physicians, medical providers, case managers, ALF/SNF administrators and staff, educators and more!



The Foundation for Indigent Guardianship is generously sponsoring the Leadership in Excellence Awards, July 23, 2025, at the Rosen Plaza

Do you know about the Foundation for Indigent Guardianship (commonly called FIG) as well as how FIG supports public guardianship through the Florida Public Guardian Pooled Special Needs Trust? In order to understand why FIG was created and what it does, it's important to understand the guardianship system in Florida.

As you all are aware, today there are 3 main types of Florida guardians: Professional, Family, and Public guardians. However, Public guardianship was not established in Florida until the 1990s and was one of the first states to establish public guardianship as a public service and tasked the judicial system with funding. Initially only 4 circuits created a public guardian office.

In 1999 the Statewide Public Guardianship Office, (SPGO) now known as the Office of Public and Professional Guardians (OPPG), was created (by the Legislature) located within the Department of Elderly Affairs (DOEA) with the following intent: to establish the office of public guardians for the purpose of providing guardianship services for incapacitated people when no Private guardian is available. However, again, inadequate funding was appropriated for this service to be available statewide.

After years of various attempts to increase funding for public guardianship and under the leadership of Michelle Hollister, Esq. Executive Director, SPGO was given the statutory authority to create a Direct Support Organization for the sole purpose of supporting the statewide office. In 2005 the Foundation of Indigent Guardianship (FIG) was incorporated, followed by becoming recognized by the IRS as a 501(c)(3) organization, and soon thereafter was contracted by the Department of Elderly Affairs to be the support organization for SPGO.

FIG's mission is "To serve as the direct-support organization for the Office of Public and Professional Guardians within Florida's Department of Elderly Affairs as **defined in Section 744.2105, Florida Statutes.**" FIG's statutory authority includes:

1. To conduct programs and activities
2. To raise funds
3. To request and receive grants, gifts, and bequests of money
4. To acquire, receive, hold, invest, and administer securities, funds, objects of value, or other property, real or personal
5. To make expenditures to or for the direct or indirect benefit of the OPPG
6. To be consistent with the goals of the office, in the best interests of the state, and in accordance with the adopted goals and mission of DOEA and OPPG.
7. The current officers of the FIG Board are:

Monica Gent, Professional Guardian, Chairperson
Melinda Coulter, Family Guardian/Advocate, Vice-Chairperson
Ya'Sheka Williams, Esq., Secretary
Randy Riley, Public Guardian, Treasurer



Other board members include:

Darrin Francis, Professional Guardian, Vice Chair Elect;
Karen Murillo, Esq.
Edward O'Sheehan, Esq.
Gwendolyn Spencer, Esq.
and Vicki Simmons serves as the Executive Director.

As an independent Florida non-profit organization, FIG receives no federal or state funds, but as noted in the statutory authority, FIG does have authority to apply for grants and is able to receive charitable contributions. To date the heart of FIG's funding has been the pooled special needs Trust created in 2006.

As with other pooled special needs trusts, the FIG Trust enables eligible individuals to set aside their assets or income for enhanced independence, comfort, and dignity while remaining eligible for benefits from Medicaid, SSI, and other public programs during their lifetime. However, **the Florida Public Guardianship Pooled Special Needs Trust is the only pooled special-needs trust that specifically designates surplus funds to go to benefit public guardianship in Florida.** Beneficiaries can place assets in the FIG Trust via a joinder agreement. If there are remainder funds, after any potential Medicaid reimbursement are paid, the remainder goes to support the public guardian program. Currently 80% is offered to the public guardianship program in the Florida county where the joinder agreement was initiated and 20% is retained for FIG administrative expenses. FIG is the founding trustee and has contracted with Advocates & Guardians for the Elderly & Disabled Inc. (AGED) to be the trust's administrative trustee.

Special Needs Trust (SNT) is a type of trust that allows a person to keep assets and still qualify for public benefits. They are specifically designed for persons with disabilities or who anticipate acquiring a disability. However, at the time of the purchase that person does not need to have a disability or be receiving governmental benefits – but anticipates they may need public benefits in the future. Benefits such as Medicaid, SSI, food stamps, public housing, etc.

A Pooled Special Needs Trust is a SNT that has already been created and is maintained by a non-profit organization, already has a trustee identified and has other beneficiaries. Since these trusts already exist, there are no additional legal fees required to establish this type of trust. The Florida Public Guardianship Pooled Special Needs Trust (AKA FIG Trust) is this type of trust.

Funds in a SNT can be used to supplement what the public benefits won't pay for – such as housing, clothing, entertainment, etc. These types of trust are particularly beneficial to individuals with disabilities who may have a windfall from a personal injury case, sale of a home or inheritance and want to gain or maintain governmental benefits.



As with all pooled special needs trust, when a beneficiary of this type of trust passes, the state(s) in which the person received governmental services is/are notified and the amount paid by the state for the individual is determined (Medicaid). If the residue of the account is less than the amount paid out in benefits, 100% of the residue is passed on to the trustee. With the FIG Trust, 100% of the residue is passed to FIG. FIG then retains 20% for administrative costs and offers 80% to the public guardianship program serving the county where the trust originated. The program is then required to provide the FIG Board with a proposed budget in order to receive those funds. Currently the Board emphasizes that programs focus on the needs of their public clients.

Examples of expenditures funded by FIG Include:

- Re-roofing the home of a disabled brother and sister living in their own home which they inherited
- Purchase of a wheelchair (not covered by Medicaid)
- Purchasing of companion hours for individuals living in group homes but not qualifying for waiver benefits
- Providing each public guardianship office in the State with winter holiday money to provide gifts for their clients (FY 22-23 provided \$20/client, FY 23-24 provided \$25/client and FY 24-25 FIG provided \$30/client)
- Providing Pre – need funeral expenses for Clients who are unable to fund their own
- Emergency Dental Work for Clients
- Assisting staff of public programs to maintain their CEUs

For the last two fiscal years, FIG's audited financial activity was:

FY 22-23	Income = \$366,796.10	Outflow = \$400,224.89
FY 23-24	Income = \$293,403.63	Outflow = \$290,352.22

And to further breakdown the outflow for FY 23-24:

Client Needs =	\$204,621.82 or 70.5%
Program Needs =	\$ 60,244.40 or 20.7%
Administrative Costs =	\$ 25,486.00 or 8.8%

Total Outflow = \$290,352.22

Public guardianship benefits professional and family guardians by helping to reduce their pro bono caseload. Therefore, when considering investment in a pooled special needs trust for yourself or for one of your clients, please carefully consider where the residue of that trust will go: to public guardianship in Florida or to wherever the administrative trustee decides it will go.

Will you join FIG by utilizing the FIG Trust? It's a great way to support public guardianship programs in Florida. For more information about using our Trust, please visit:

<https://trustaged.org/the-florida-public-guardianship-pooled-special-needs-trust/>

FIG's website is <http://FIG4OPG.org> and the phone number is (850) 907-1299