FSGA™
Florida State Guardianship Association

BULLETIN

VOLUME 2 – 1

FSGA WORKING FOR YOU IN TALLAHASSEE

Once more FSGA will have an active presence in Tallahassee in the coming months and in preparation for the 2027 Legislative Session which is scheduled to commence on March 2nd. Legislators will nonetheless be convening earlier with preliminary meetings right before Thanksgiving and immediately after.

Additionally, FSGA is currently planning its Annual Rally Tally for the week of February 1st. Our annual treks have been invaluable to everyone as besides meeting with policy makers, we spend time talking with agency leaders including those from the Dept. of Elder Affairs. Each Chapter is encouraged to send representatives from your area to join in this important effort.

Of particular note, FSGA this year is proposing certain changes and improvements to Florida law. Chief among them is to once and for all consolidate the annual registration process for guardians in just one agency – that of OPPG, and stop the needless duplication to also register with each County's Clerk of Court. This duplication stems from old laws no longer applicable and wastes time and energy from both the guardian and the Clerk's Office. Far better the Clerks use the valuable time to be timely with the annual accountings for instance.

In the interim, each Chapter is also encouraged to invite your local state legislators to your Chapter meetings. Being engaged in conversations with policy makers is always a good thing.

Everyone's involvement in all these efforts is welcomed and needed.

39th Annual Conference: A Strong Three Days of Connection and Learning

The FSGA's 39th Annual Conference, Pathways to Professionalism, brought together 487 attendees for three days of learning, connection, and meaningful conversation. With 23 speakers and a diverse lineup of timely and engaging sessions, the conference offered attendees opportunities to strengthen their knowledge, exchange ideas, and connect with colleagues from across the state.

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We are still compiling conference resources and finalizing video content, which will be added to the Whova app as it becomes available. CE credits have been uploaded, so please check CE Broker to confirm that your credits are reflected accurately.

And finally, thank you to our members. Your participation, enthusiasm, and commitment are what make FSGA—and our conferences—strong.

The Partners Behind the Pathways

A special thank you to our conference sponsors for their continued support. Their investment helps FSGA provide a high-quality conference at an affordable rate and supports the work of our association throughout the year. Please remember our sponsors when looking for organizations and services to partner with—they are among the businesses and organizations that support FSGA and the work we do.

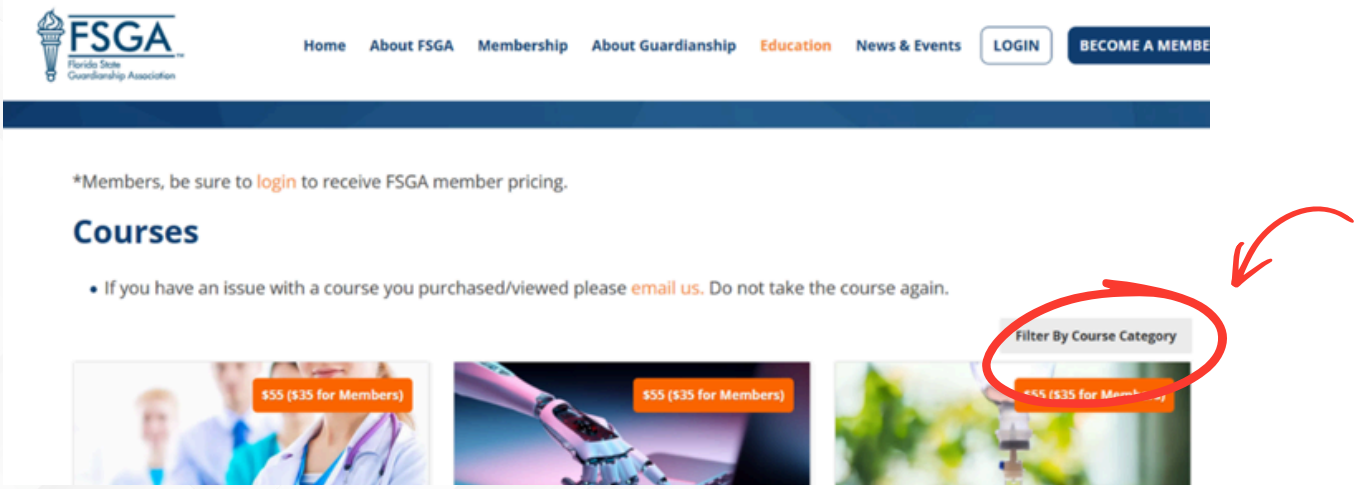
6th Annual Symposium and FSGA's Annual Lobby Day

FSGA plans to hold our Annual Lobby Day alongside the 6th Annual symposium in Tallahassee February 4, 2027.

The greatest value of this event is your presence: showing up, building relationships, educating lawmakers on guardianship, and reinforcing FSGA as a trusted resource. Our increased visibility at the Capitol over the last few years has strengthened our reputation and influence, your participation directly contributes to that progress. Plus, it's a fun and meaningful opportunity to spend time with fellow FSGA members.

YOU ASKED AND WE RESPONDED.

Looking for specialized CEU to complete your requirements?
Please see the new searchable feature, where you can peruse our library by specialization



Giving Back: Broward Chapter Supports the Public Guardian

When Mission Meets Generosity

The Broward County Chapter of FSGA is proud to continue advancing their mission through support of indigent wards, education for guardianship professionals, and meaningful community outreach. They were pleased to make a significant donation to the Broward County Public Guardian, with the funds designated solely for the benefit and needs of the individuals they serve.

Honoring the Best and the Brightest

Celebrating Excellence and Leadership in Guardianship

The Florida State Guardianship Association (FSGA), in partnership with the Foundation for Indigent Guardianship (FIG), proudly recognized the 2026 Leaders in Excellence recipients for their outstanding dedication to serving some of Florida's most vulnerable adults.

This year's honorees represented eight of Florida's designated public guardian programs overseen by the Florida Department of Elder Affairs. Each demonstrated exceptional leadership, professionalism, and commitment to the individuals they serve.

In addition to the Leaders in Excellence Awards, FSGA presented two Leadership in Service Awards to individuals whose contributions have made a lasting impact on the guardianship profession.

Leadership in Service Award | Kyle Harmer, FCCM

As Operations Manager for the Office of Public and Professional Guardians, Kyle Harmer has gone far beyond simply doing his job. He has become a genuine advocate for professional guardians, consistently working to ensure they have the guidance, resources, and support necessary to serve Florida's most vulnerable citizens.

Kyle's positive attitude, responsiveness, and commitment to following through have earned him the respect and appreciation of those who work with him. His dedication reflects a true commitment to strengthening the guardianship profession and the people it serves.

Leadership in Service Award | Enrique Zamora, Esq.

Enrique has 30 years as a Board-Certified Elder Law practitioner and has played a significant role in educating Florida's guardianship community, including leading training for members of Examining Committees and contributing to the development of the statutorily required four-hour and two-hour courses for examiners. He has also shared his knowledge and expertise through numerous educational programs for guardians and attorneys.

FSGA is proud to recognize Enrique for his many years of service and dedication to high standards, professionalism, and the continued improvement of guardianship throughout Florida.

Congratulations to all of our 2026 honorees! Their dedication, leadership, and commitment to excellence represent the very best of Florida's guardianship community.

Honorees

Courtney Darnell, Patrick Weber, P.A., Public Guardian

Sundaree Nanan, Fifth Circuit Public Guardian

Deneisha Watson, Legal Aid Society of Palm Beach County

Liz I., Tenth Circuit Public Guardian

Wayne Parks, Guardianship Program of Dade County

Brittnee Clark, North Florida Office of Public Guardian

Erin Bouchard, Lutheran Services Guardianship

Tammy Wilson, Lutheran Services Guardianship

THE VOICES THAT SHAPED OUR CONFERENCE

A conference is only as strong as the people willing to share their knowledge, experience, and perspective. This year, 23 outstanding presenters helped us explore new pathways to professionalism—from dementia and ethics to guardianship law, fiduciary responsibilities, technology, and beyond.

Our 2026 Conference Faculty

Ethics and Case Based Studies

Kenneth Goodman, Ph. D., FACMI, FACE,
Ray E. Moseley, Ph. D.
Enrique Zamora, Esq.

Dementia & Alzheimer's Education

Dr. Joshua J. Freitas, Ph.D.
Dr. Shadi Gholizadeh, Ph.D., MPH
Marcy R. MacPherson, MSW, BSW, BA, CDP, CADDCT, CDSGF, CDN

State Agencies and Programs

Cari Eyre, Department of Elder Affairs
Taroub J. Faraj, Office of Inspector General
Don Pearson, Office of Inspector General

> ***Thank you for running such a professional and cohesive event..- Vivian V***

Guardianship Law

The Honorable Judge Tesha Ballou, 18th Circuit Florida
Heather Boyer Samuels, Esq.
Edwyn A. Bayó, Esq.
Harry T. Hackney, Esq.
Ross Alanga, Esq.

> **This has been such a wonderful experience! It's organized and I'm loving the sessions. Thanks for all the hard work!-Karla M**

> **Excellent organization and clear communication throughout. The app has been a gamechanger. - Sonya L**

Guardianship Practice and Professional Responsibility

Carlos Mc Donald, FSGA President
Cindy Kramer, Professional Guardian and Care Manager
Jean Rose, Probate & Guardianship Expert

Fiduciary Duties

Keith Seago, CFP®
Mark Vernick, Certified Financial Planner (CFP®)
Jeremy Lau, Chartered Financial Analyst (CFA®) and Certified Financial Planner (CFP®)
Sharon Reich, CTFA, CSA.

Medical and Clinical

Dr. Leonard R. Hock, DO, MACOI, CMD, FAAHPM
Mari Adams, MSN-Ed, BSN, RN, CHPN
Jennifer Demaio, Doctor of Chiropractic (DC)

> ***What's standing out most to me so far is the sense of community, with people sharing ideas, cheering each other on, and connecting through the app. Thank you for making this happen!- Mari A***

PROTECTING CLIENTS' FINANCES THROUGH FLORIDA'S PUBLIC GUARDIANSHIP POOLED SPECIAL NEEDS TRUST

Foundation for Indigent Guardianship, Inc.

Effective guardianship involves protecting clients' finances while helping them qualify for public benefits such as Medicaid and Supplemental Security Income (SSI). For clients dependent on these benefits, managing assets without jeopardizing eligibility is complex.

The Foundation for Indigent Guardianship, Inc. (FIG), Florida's official support organization for the Statewide Office of Public and Professional Guardians, has a pooled special needs trust to simplify this process. Managed by Advocates & Guardians for the Elderly & Disabled, Inc. (AGED), FIG's trust safeguards clients' assets and provides funding to improve clients' care, dignity and oversight.

Key Benefits of FIG's Pooled Trust

- Expert assistance protecting clients' finances while maintaining benefit eligibility.
- Funding for personal needs like clothing, medical care, dental, transportation, and burial.
- Transparent financial management with online access and quarterly statements.
- Oversight to prevent loss of benefits due to trust distributions.
- Annual independent audits for peace of mind.
- Financial support for public guardianship programs, ensuring a legacy of care for Florida's vulnerable populations.

Mission and Legal Foundation

Created in 2005 under Florida law (Section 744.2105), FIG supports public guardian programs by providing supplemental financial resources that state funding alone cannot cover.

How It Works

Anyone, including public guardians, can use the FIG pooled trust to protect assets and preserve eligibility for public benefits. AGED administers more than 250 pooled trust accounts, helping ensure regulatory compliance and financial security. After a beneficiary dies, most remaining trust funds return to FIG, which redistributes them to local public guardianship programs to support other clients. Public guardians may also apply to FIG for special emergency funding when an Offer for Funding has not been received.

Leadership and Accountability

FIG is governed by a board appointed by Florida's Department of Elder Affairs, maintaining strong oversight, transparency, and alignment with statewide priorities. Annual audits reinforce its commitment to stewardship and service for indigent, incapacitated Floridians.

Getting Started

To support clients' financial protection and benefit eligibility, consider setting up a FIG pooled special needs trust. More details and application forms for Public Guardians' funding requests are available at

- **FIG's Website: https://www.fig4opg.org**
- **FIG's Trust forms and information can be found at:**
- **https://trustaged.org/the-florida-public-guardianship-pooled-special-needs-trust/**