



The Professional Guardian

eNewsletter

FEBRUARY 2017

A publication by the Guardian Association of Pinellas County for the purpose of promoting advocacy & education.

Calendar & Coming Events

FEBRUARY 21, 3:30 P.M.

GAPC BOARD MEETING

Palms of Largo - REGAL PALMS Bldg.
VERANDAH ROOM

FEBRUARY 21, 5:30 P.M.

MEMBERSHIP MEETING

"KEPRO, Beneficiary & Family Centered Care Quality Improvement"

SYLVIA GADDIS

1 CEU available

Hors d'oeuvres at 5:30 p.m.,

Palms of Largo - CYPRESS PALMS Bldg.
400 Lake Avenue NE, Largo

RSVP to Association Website:
www.GuardianAssociation.org

FEBRUARY 24, 9:00 A.M.

GAPC NETWORKING BREAKFAST

PACIFICA SENIOR LIVING - BELLEAIR
620 Belleair Rd., Clearwater 33756

RSVP to Association Website
www.GuardianAssociation.org

ASSOCIATION COMMUNICATIONS
P.O. Box 1826
Pinellas Park, FL 33780
(727) 744-8600
Info@GuardianAssociation.org
www.GuardianAssociation.org

SPEAKER INFO

"KEPRO - THE BENEFICIARY & FAMILY CENTERED CARE QUALITY IMPROVEMENT ORGANIZATION"

Sylvia Gaddis



Sylvia Gaddis

Sylvia Gaddis is an Outreach Specialist for KEPRO covering the state of Florida and will present an overview of KEPRO and services provided along with the appeals process, complaint process, advocacy and case studies. Sylvia has been in the field of service to seniors in different capacities for twenty years. She started out in claims with Medicare and over the years has provided education to the elderly and their caregivers about Medicare benefits, quality improvement, and healthcare fraud along with the services and resources available. In her current position she prepares and presents educational programs and resources to make stakeholders, providers, Medicare beneficiaries and their families aware of Medicare rights and the role of the Beneficiary and Family Care Centered Quality Improvement Organization (BFCC-QIO).

BECOME A GAPC MEMBER TODAY...

Reap the benefits of networking with a knowledgeable group of professionals, receive the GAPC monthly eNewsletter, **exclusive to members only. and only members have access to the Member Directory.** Obtain a reduced fee for the Annual Conference, access a forum for your concerns/questions with online payment via PayPal. To join or to continue your membership go to our website [HERE](#).

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FROM THE DESK OF THE PRESIDENT

Traci Samuel

THOUGHTS FROM THE PRESIDENT...

I rarely am asked what a Professional Guardian does; however, prior to becoming a Professional Guardian I was a Registered Respiratory Therapist and often asked what a respiratory therapist does. I have come across many people in the community who are unsure of what guardianship entails. To understand guardianship we start with a few simple questions.

Why is guardianship necessary in the first place? Individuals who aren't able to make decisions for themselves as a result of Alzheimer's or other dementias, mental deficiency, strokes, or other life circumstances that make it difficult or impossible for someone to manage their own affairs, could have a high likelihood of needing a guardian.

Shouldn't guardianship be the role of a family member? Ideally a family member could act as guardian. However, at times there is no family member available, willing or qualified. In this situation, a Professional Guardian would be warranted.

Who is in need of a guardian? Anyone who a judge feels lacks the capacity to retain specific rights and duties could be appointed a guardian. Anyone in good faith can file a petition for incapacity and guardianship. This can be done with the help of a licensed elder law attorney.

How does guardianship get initiated and are Professional Guardians licensed? Technically, Professional Guardians are not licensed however, they are required to be registered through the Department of Elder Affairs. To become registered, they must complete a training course, pass a competency exam, pass a criminal background and credit check and obtain a bond. In addition, continuing education is required.

This is just a small sample of some of the questions one may have regarding guardianship. One goal I have in 2017 for the Association and me personally, is to educate the community. Guardianship has been so rewarding for me since working in this field. I have seen that there is such a need for guardianship in our elderly population and I feel it all starts with education.

TRACI

samueltraci@yahoo.com

NETWORKING BREAKFAST

CREMATIONIT'S CATCHING ON!



David Menneke

David Menneke, owner of Florida Family Cremations, Inc. has been a member of the Bay Area Marketing Association, Bay Area Senior Education Services, Cremation Association of North America, as well as Better Living for Seniors. He is also the new Treasurer of the Guardian Association.

David will be speaking at the February Networking Breakfast about cremation and pre-need planning.

Come join us February 24th at 9:00 a.m., Pacifica, 620 Belleair Road, Clearwater. This is sure to be a great presentation as well as a productive networking opportunity, and a terrific breakfast.

2017 CONFERENCE PLANNING IS UNDERWAY

This year we celebrate the 40th Anniversary of the Guardian Association and the Conference Committee is already planning a memorable event. Committee members Traci Samuel, Tina Costa and Irene Rausch are working on selecting a site, setting a date and choosing a theme. We are hoping to secure outstanding presenters and we need your assistance. Listed below are some prospective topics for the Conference; if you know of a dynamic and effective speaker for any of them, please send the name and contact information so we can send them a presenter proposal. We are also seeking information on retired probate judges and past presidents of the Association.

- Agency for Persons with Disability - what do they do, what are the roles, funding, resources
- Marketing yourself to grow your business-networking, business cards, brochures, Facebook
- Using technology in guardianship practice
- Case Study with panel of guardians
- Funeral practices for different religions - panel of priest, rabbi, minister
- Setting up files, record keeping, time keeping, accounting programs
- Guardianship as a small business - what you need to know
- Financial options planning for the guardian's retirement
- Examining Committee, tests administered, how they determine what rights to be removed
- Working effectively with attorneys/paralegals - panel of paralegals
- Restoration of rights, process, how can we assist the ward in regaining competency
- Legislative update - new laws passed in 2017
- Interested persons, confidentiality, protecting the ward's privacy
- People with Dementia - how to talk to them, how to deal with them
- Eye Care and the Ward with Dementia - what to treat, what not to treat
- Diabetes - new advances in treatment
- Skin problems - skin cancer, scabies, etc. how to avoid, how to treat
- Alternative Treatments - what are they and can we use them for our wards
- Cardiovascular Issues - pacemakers, defibrillators, stents, medications



Martha V. Evans, Esq. (left) from Hitchcock Law Group, performed the installation of Officers & Board. Pictured left with Traci Samuel, GACP President



JANUARY
17TH



CYPRESS PALMS, LARGO



A GUARDIAN'S FIDUCIARY DUTY

by Christos Pavlidis, Esq., Gilbert Garcia Group, P.A.

It is important for a guardian to always be mindful of potential conflicts of interest and to carry out his or her responsibilities without breaching the fiduciary duties to their Ward. Because a guardian is given authority to exercise those rights that have been removed from the ward and delegated to the guardian, Florida law has created strong safeguards to ensure that a guardian is not abusing their relationship with the ward. The Florida Statutes provide guidance in this regard. Florida Statute 744.446 deals with issues surrounding conflicts of interest; prohibited activities; court approval and breach of fiduciary duty. This statute explains that the fiduciary relationship which exists between the guardian and the ward may not be used for the private gain of the guardian other than the remuneration for fees and expenses provided by law. It is important to note that unless prior approval is obtained by court order, or unless such relationship existed prior to the appointment of the Guardian and is disclosed to the court in the petition for appointment of Guardian, a Guardian may not: (1) have any interest, financial or otherwise, direct or indirect, in any business transaction or activity with the guardianship; (2) acquire an ownership, possessory, security, or other pecuniary interest adverse to the ward; (3) be designated as a beneficiary on any life insurance policy, pension, or benefit plan of the ward unless such designation was validly made by the ward prior to adjudication of incapacity of the ward; and (4) directly or indirectly purchase, rent, lease, or sell any property or services

from or to any business entity of which the guardian or the guardian's spouse or any of the guardian's lineal descendants, or collateral kindred, is an officer, partner, director, shareholder, or proprietor, or has any financial interest.

These requirements exist to protect the ward and also the guardian from improper relationships and entanglements. Failure to carefully abide by these rules could result in removal of the guardian and the imposition of personal liability through a proceeding for surcharge. The court which appointed the guardian could also get involved and take any necessary actions required to protect the ward and the ward's assets. As a guardian, it is essential to the proper conduct and management of a guardianship that the guardian be independent and impartial. Following the statutory guidelines is important to ensure that the guardianship relationship is successful for all parties involved.



Christos Pavlidis, Esq.

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Group, P.A.



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How to De-Prescribe from Too Many Medications from NewsGram at Sunrise Senior Living

The benefits of prescription drugs are well known, such as promoting general wellness and warding off disease and infection.

But taking multiple prescriptions at once may be more harmful than you think. The mixed reaction can cause dangerous side effects and produce a result that's worse than what you were dealing with in the first place. How can you keep yourself from experiencing the backlash of taking too many prescriptions? Doctors and clinical researchers told NBC News the answer is to get de-prescribed.

A NATION-WIDE GROWTH IN THE USE OF MULTIPLE PRESCRIPTIONS

How much of the population is taking too many medications? Researchers analyzed the National Health and Nutrition Examination Survey to get a better understanding of the change in prescription drug use between 1999-2000 and 2011-2012. They found that 40-64 year olds taking five or more prescription drugs increased from 10 to 15 percent. Among those aged 65 and older, it increased from 24 to 39 percent.

The number of seniors taking multiple medications at once isn't the only thing that has increased. Seniors are also at a higher risk of experiencing a dangerous reaction as well.

WHY DOES THIS HAPPEN?

Older adults are more prone to side effects from certain prescriptions - but why? With age, the body goes through changes, both mentally and physically. This has an impact on the way one's system accepts and reacts to the medications being consumed.

Seniors are already at a higher risk of falling, but according to NBC News, those who take sleeping pills and antidepressants are more likely to take a tumble due confusion and dizziness being a strong side effect of these medications. And when an older adult reacts this way on a normal basis, he or she may try to counteract the outcome with another prescription drug.

Taking another medication to counter balance the effects of one prescription can be very dangerous. It can exaggerate or avert the initial result that the first medication was producing. According to the Arthritis Foundation, the interaction could also cause one of the medications to remain in the body for longer periods of time, ultimately causing an overdose.

It's common for seniors to see more than one physician, which may be the reason they're taking too many prescriptions.

It's also common for older adults to see more than one specialist every year. So instead of receiving one prescription from a single physician, seniors receive multiple recommendations for medications from doctors who are concerned with something they specialize in.

HOW TO REDUCE THE RISK

Because the harmful outcomes of taking multiple medications outweighs the positives, more doctors are recommending patients to de-prescribe.

The idea of de-prescribing is simple. It's meant to encourage a medication evaluation from your doctor to see if you can cut back on certain prescriptions to lessen side effects and improve your overall health. If you're concerned about taking too many medications, talk to your primary physician about the following:

1. Monitoring the reaction - Your doctor may suggest having a family member or nurse at your senior living community monitor the reaction you have after taking your prescriptions. If



you're taking multiple medications, Humana Chief Medical Officer Dr. Roy Beveridge, recommends having someone who knows exactly what you're taking, what's working, and what you may be able to do without in the de-prescribing process.

2. Handling all of your prescriptions - Instead of taking too many medications recommended by multiple doctors, you should have one physician coordinate your prescriptions. This will likely decrease the number you'll continue to take.

3. Changing the dosage - Your doctor may suggest staying on the medication, but at a lower dose to ease side effects.

4. Adjusting the timing - Your medications could be counteracting each other if you're taking them within the same time period. Talk to your doctor about creating a prescription time schedule.

You may also talk to your primary care physician about possible alternatives to taking prescription drugs. Making simple lifestyle changes, such as eating a well-balanced diet and exercising on a regular basis, may help to ease the effects of certain chronic conditions and illnesses you're living with.



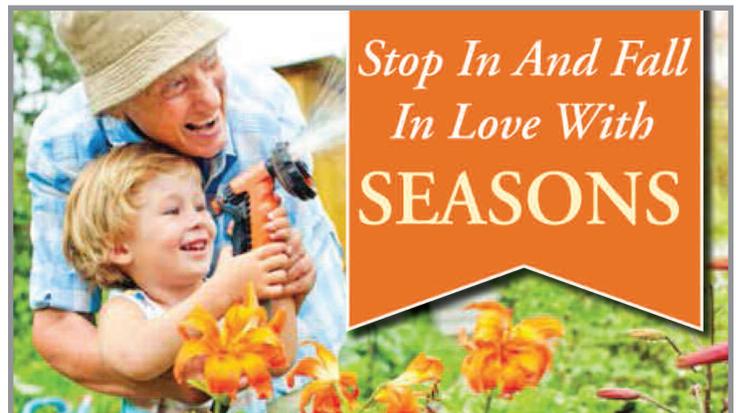
A Note from...

Karen Karle Truman, Ph.D.

Last week I was assisting a group of folks who were trying to help a neighbor. The elderly lady had fallen (again) and now broke her hip. Her husband had passed several years ago and she was reverting back to her native French language. She has no one to help her except her long-time friends and depends on them for everything. The handwriting is on the wall and many things have been set in motion. The Elder Law attorney has come to the rehab facility to get new documents signed; the VA has been notified that she is eligible for her husband's benefits; her refrigerator has been cleaned out; and professionals have been called in to make sure all is done legally and professionally for her long-term care transition. As long as she fought this – the interesting thing is that now she is thriving on all the attention. She was lonely at home by herself. Sometimes it takes a village to make a difference and in this case the village cares and is attentive and the results are amazing to witness!

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STOP IT! I CAN'T PLAN FOR 2017 BUT...

SUBMITTED BY LINDA CHAMBERLAIN, ESQ.



With a background in social services prior to becoming a Board Certified Elder Law Attorney and who has achieved Martindale Hubbell's highest rating as an AV Preeminent Attorney, Linda Chamberlain presently serves as an Adjunct Professor at Stetson University College of Law. She is Founder and President of the newly merged Aging Wisely, LLC and Easy Living, Inc. Her Elder Law practice is well versed in Medicaid planning, Medicaid applications, Long Term Care and Disability issues.

I CAN GET ORGANIZED

There is no way I could have predicted, thank goodness, the major events in my life over the last five years. My mother passed away with ovarian cancer, two of my sons got married, we now have two grandchildren, my 91 year old Dad got remarried, moved, and died and one of my best friends died.

I keep a crystal ball in my office. I often tell clients I meet with it's not working today. We will quickly look over at it and see right through it, it tells us nothing. I'm actually glad about that because there are many events you simply cannot plan for and the anxiety of worrying about them happening is often worse than the actual event.

What I have realized over the last five years is that I can be more organized and need to be more organized to be prepared for what life brings my way. I am tackling the piles of paperwork and mail, documenting the many passwords and websites I use, and physically and electronically filing my documents and paperwork. This is not a task that is complete in a day or week, and to be honest I am still working on it.

When my friend died I was truly amazed with the time he had taken getting organized and planning for his death. While many of us glibly will state we are doing it and that we are prepared, in reality I find most people will not complete what is required while they are living. Many of us prefer instead to avoid thinking about it and leave many required tasks to our surviving loved ones. It is easy to say "if" I die, when there is no doubt about it, it's a "when" I die.

EXIT STRATEGY

I have to admit, I get tired of hearing about planning for my death. I do like the idea of organizing my Exit Strategy – something about saying that makes me sort of smile. I am going to tackle my Exit Strategy this year and get organized. It will be useful for living and eliminate much stress I bring upon myself not being able to find things when I need them. There will be many tips to share through the process, stay tuned. Join me this year and my Aging Wisely journey as I become more organized and prepare my Exit Strategy.



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OPPG DEFINES ADVERSE CREDIT HISTORY

BY IRENE RAUSCH, MASTER GUARDIAN

A frequent concern posed by individuals interested in becoming a guardian is in regard to their credit history and the possibility that “bad credit” may disqualify him or her to serve in this capacity. A recent change to rules for professional guardian registration with the Office of Public and Professional Guardians clarifies what constitutes adverse credit history.

1. A personal bankruptcy within the previous 5 years
2. Bankruptcy within the last 5 years of any organization based on events that occurred when the application was in a position of control of the organization
3. Outstanding tax lien or other governmental lien
4. Outstanding judgement or judgement within the last 5 years that is based on grounds of fraud, embezzlement, misrepresentation or deceit.
5. Open collection account or “charged off” account that remains unpaid, except accounts related solely to unpaid medical expenses. “Charged off” means an account that has been identified by a creditor as an uncollectable debt.

6. Foreclosure on any property owned by the applicant within the last 5 years.

A free credit report may be obtained from:

annualcreditreport.com for the 3 major credit reporting companies: Equifax, Experian or TransUnion. When you apply on-line to receive a credit report you will be asked a number of questions pertaining to past credit references. They are sometimes difficult to answer to prevent unauthorized people from accessing your records. If you “fail” to answer correctly, you can request the report via phone at 1-877-322-8228. You will be asked some questions for verification and your report will be mailed within 15 days.



Irene Rausch

You can also request the report by mail; there are no verifications asked. Download the form at <https://www.annualcreditreport.com/manual>. The report will be mailed within 15 days of the request.



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NEW DEADLINE!

ALL SUBMISSIONS FOR THE MARCH GAPC NEWSLETTER WILL BE DUE BY FEBRUARY 20th.



The Guardian Association of Pinellas County encourages all members and/or vendors to utilize PayPal for all transactions

This 'n That



- ❖ **Tuesday, February 7th:** Long Term Care Solutions, LLC is hosting a luncheon and discussion on new Medicaid numbers and Medicaid changes in 2017. 12:00 noon at 3665 Ulmerton Road, Clearwater, 33762. RSVP at (727) 240-0750 or Charlotte@LTCsLLC.com.
- ❖ **Wednesday, February 8th:** The Fountains at Boca Ciega Bay will have their next Brunch & Learn beginning at 9:00 a.m. Speaker will be the CEO of Palms of Pasadena Hospital, who will be providing an update on the hospital's renovations and new services available. 1255 Pasadena Ave. S., St. Petersburg 33707. RSVP to (727) 235-6939.
- ❖ **Wednesday, February 8th:** You're invited to the motivational breakfast meeting at Grand Villa of Largo, 750 Starkey Road, Largo 33771. The speaker's topic will be *Getting Past Fear! Coping Skills to Help Through Everyday Challenges*. 9:30 - 10:45 a.m. RSVP at (727) 586-0108.
- ❖ **Thursday, February 9th:** Moody Manor, the sister facility to TBI Residential Services will be hosting an Open House, 3:00 to 6:00 p.m. Moody Manor has recently become a part of the Extended Care Family of United Cerebral Palsy of South Florida. For more information, contact Kim at (954) 434-2016.
- ❖ **Thursday, February 9th:** Seasons Belleair continues their series of *Dinner With a Doc*. Join them for a light dinner with Dr. "Sunil" Srivastava as he discusses "Relevant Dementia Care". 5:00 - 6:30 p.m. at 1145 Ponce de Leon Blvd., Clearwater 33756. RSVP to (727) 754-9797.
- ❖ **Thursday, February 9th:** All are invited to Griswold Home Care's *Delivered with Heart Awards* along as they celebrate their 25th Anniversary. 6:00 - 8:00 p.m. at The Chihuly Collection, 720 Central Avenue, St. Petersburg. **GAPC member Bernadette Homan** is nominated for the *Spirit Delivered With Heart Award* which recognize those who help other professionals feel supported, connected, valued. This colleague helps others stay positive and connected to our community. Bernadette is the Business Development Specialist at Arden Courts Memory Care Communities, Largo & Seminole.
- ❖ **Referral Networking Group** breakfasts, held the 2nd Thursday of each month at Princeton Village, will be morphing into an evening event, exchanging eggs for wine Stay tuned for announcements of when this will start. The last breakfast was January 12th.
- ❖ **Friday, February 10th:** Better Living for Seniors (BLS) will hold their Quarterly Consortium at The Fountains at Boca Ciega Bay, 1255 Pasadena Ave. S., St. Petersburg 33707. 8:30 - 11:00 a.m. For more information and to register, blspinellas.org.
- ❖ **Thursday, February 16th - 18th:** Master Guardian and GAPC Vice President Irene Rauch will have a review in preparation for the Florida Guardian Competency exam in Palm Harbor. Information will be on her website guardiantraining.com.
- ❖ **Thursday, February 16th:** Tampa Bay Research Institute will host a luncheon 11:45 a.m. - 1:00 p.m. with speaker Lynn Valaes on *Exercise for Your Healthy Heart*. 10900 Roosevelt Blvd. N., St. Petersburg 33716. RSVP [HERE](#).
- ❖ 2017 is starting off with a bang in the **Assisting Hands** office! Becky Moultrie who has exhibited at our last two annual conferences announces two staff changes. Jessica Sells, who has been Client Care Coordinator and Scheduler since early 2016 has been promoted to Office Manager where she'll continue to supervise the caregiving and office staff at Assisting Hands while taking on Quality Assurance and Recruiting responsibilities. Shauna Jernigan who joined Assisting Hands in 2015 has been promoted to Client Care Coordinator.
- ❖ **Thursday, February 23rd:** USF Health Byrd Alzheimer's Institute is offering a 3 hour CEU program, 8:30 a.m. - 12:00 p.m., entitled *Safety Concerns in Alzheimer's Disease Care*. Cost \$40 per person. Located at 4001 E. Fletcher Ave., Tampa 33613. Registration/more info to Kara at (813) 396-0659.
- ❖ **Tuesday, February 28th:** Networking Professional Breakfast is a new event being held at Pacifica Belleair, 620 Belleair Road, Clearwater 33756. 8:00 - 9:30 a.m. RSVP at (727) 219-1523.



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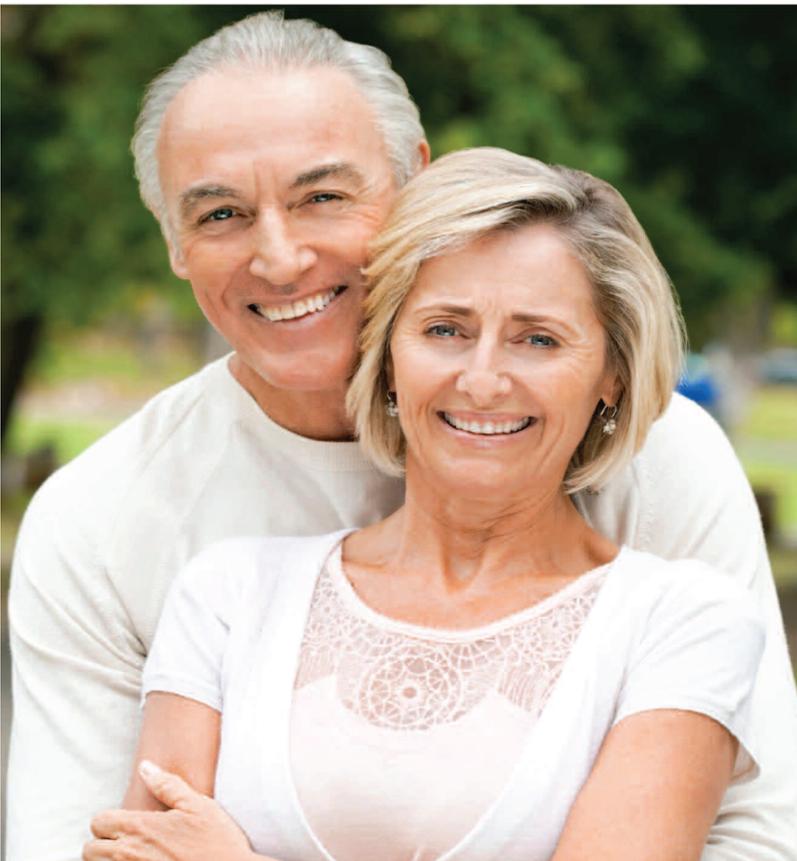
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REPEALING OBAMACARE WILL HAVE CONSEQUENCES FOR MEDICARE

By Robert PM Nordstrom

Elder Law Attorney

taken from his monthly newsletter, Elder Law News

One of President Donald Trump's campaign promises was to repeal the Affordable Care Act (ACA), aka Obamacare, and Republicans in Congress have vowed to make repeal one of their first acts in the new term. While repealing Obamacare will have implications for millions of younger people covered by the insurance, it will also affect Medicare beneficiaries.

To begin with, the ACA requires insurers to provide free preventative care coverage to Medicare beneficiaries. Without that requirement, seniors may end up having to pay for many preventative care services.

In addition, the ACA reduced prescription drug costs under Medicare Part D and phased in an elimination of the infamous "doughnut hole." The doughnut hole is the period of time in which seniors are responsible for 100 percent of the cost of prescription drugs. Under the ACA, the percentage seniors pay for drugs while in this coverage gap was capped at 50 percent starting in 2011 and is supposed to continue dropping until the doughnut hole is eliminated completely in 2020.

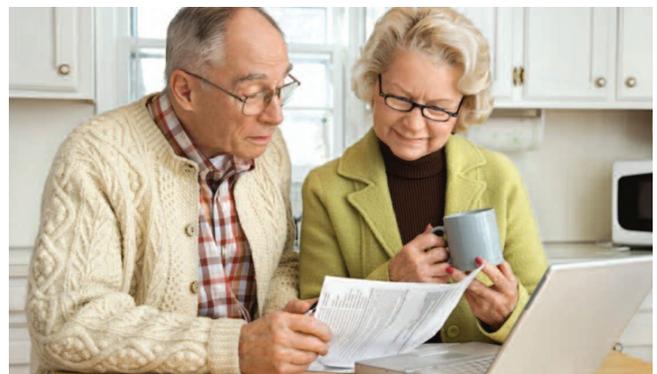
A little-known fact about the ACA is that it contains provisions designed to strengthen Medicare. Repealing the ACA may eliminate those provisions, potentially destabilizing Medicare. The ACA also established programs to reduce Medicare waste, fraud, and abuse. Thanks to these measures, according to the Center on Budget and Policy Priorities, the Medicare hospital insurance fund is projected to remain solvent eleven years longer than before the ACA was enacted.

These factors combined with the fact that millions of near-seniors aged 50-64 could lose coverage, leaving them in poorer health when they become eligible for Medicare, could raise future Medicare costs for existing beneficiaries.

Elder Law News is a monthly e-mail newsletter that brings you reports of legal developments and other trends of vital interest to seniors and their advocates.



This newsletter is brought to you by Robert P.M. Nordstrom, Elder Law Attorney, 3663 Central Avenue, St. Petersburg, FL 33713.



OBSERVATIONS FROM ALZHEIMER'S ASSOCIATION LEADERSHIP SUMMIT



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I recently had the honor and privilege to join the staff of the Florida Gulf Coast Chapter of the Alzheimer's Association at their National Leadership Summit in Orlando, FL last month. I attended breakout sessions & general sessions to learn more about the changes and benefits of local chapters merging with National; outcomes of the Alzheimer's Associations hard work raising awareness for Alzheimer's Disease and advocating for Medicare coverage for physicians to be able to bill for services after diagnosis is given to patients and families, new research and so much more.

I listened to family caregivers and persons with Alzheimer's talk about their experience and how the Alzheimer's Association helped them get through the fears, loneliness, and shame. I heard a college student share her experience with her father's diagnosis, two 50 year old men diagnosed with MCI, and many others who shared their story and how they were "saved" by the help of the Alzheimer's Association.

I have been a volunteer with the Alzheimer's Association since 1998 and amazed how so many people are not aware of the Alzheimer's Association and the services they provide. By 2025 we will see an explosion of persons with Alzheimer's disease and the need for Advocacy, Research and Support is greatly needed. The monies raised from Walk to End Alzheimer's, The Longest Day, Reason for Hope and other programs, will help.

At the Alzheimer's Summit this year the word was **ACCELERATE. Accelerate Forward, Together, Faster for a Cure.** The hope is that one day there will be a survivor, the One White Flower that will represent the first SURVIVOR of Alzheimer's disease.

This year, the Alzheimer's Association hopes to raise more money towards that goal. I invite any and anyone who is reading this article, to join me on the Walk Committee. We started rolling out committee meetings 1/31/17 and will be meeting monthly. We are looking for team captains for various positions. If you or someone you know is interested in being on the Walk Planning Committee, please call the Alzheimer's Association, Susana Arneson (727) 578-2558.

CHEERFUL VALENTINE DAY ACTIVITIES FOR SENIORS

TIPS FROM LYNNMARIE BOLTZE

Valentine's Day is for everyone, not just for couples – everybody can celebrate! It's the perfect time to show love and affection to all the people you care about. It's also an opportunity to spend quality time with your older adult.

Create a festive environment. Use simple decorations of colored paper chains and lots of colored hearts.

Celebrate with family & friends. Any holiday is a good reason to get together. Have a casual potluck or tea social!

Enjoy Valentine-themed activities. Puzzles are always fun. Coloring is a wonderful way to relax. Don't forget games.

Make homemade treats to share. Celebrate with Valentine cookies or easy desserts.

Watch a classic romantic movie or romantic comedy like *Casablanca* or *When Harry Met Sally*.

Share love with the community. If your older adult likes to knit, crochet or sew, consider making red or pink items to donate to local shelters or hospitals.



Division of Inspector General

14

Office of Ken Burke
Clerk of the Circuit Court and Comptroller
For Pinellas County, Florida

HOW TO AVOID AN ORDER TO DISAPPROVE

The Clerk's Division of Inspector General (IG) has noted the following recurring discrepancies and complaints involving Professional Guardians. While we have discussed these in the past, they **continue** to happen.

- Guardian and/or Attorney fees and costs are paid *without* court approval.
Guardian and/or Attorney's *signature missing* from documents filed.
- *Income not reported for 12 months*; no explanations provided.
- Disbursements for household budgets *exceed the court ordered amount*; no Amended Petitions and Orders for approval are filed.
- Disbursements for large *ATM withdrawals* are made with no court order, explanations, or receipts provided.
- Disbursements for *credit card transactions* are made with no court order, explanations, or receipts provided.
- *No IRS Form 1099* or Invoices for nurse/caregiver fees for amounts exceeding \$600 or more per calendar year are filed.
- *Loans* are made from the guardianship accounts with no court approval or explanations provided.
- *Sale of the ward's automobile* is completed with no court order or proof of deposit of the proceeds from the sale including the bank name and the account number where the proceeds from the sale were deposited is provided.
- *Sale of the ward's real estate* does not include the closing statement and proof of deposit of where the proceeds from the sale of the home were deposited.
- *Closing of bank accounts* do not include an explanation of what the monies were used for, if it was for the benefit of the ward, or if the monies were deposited into another account.
- Proof of payment of *examining committee fees* not filed.
- Please remember to take the time to review your Annual Accountings and filings for accuracy and completeness. Too often, *a simple review will avoid an Order to Disapprove*.

If a guardian does not respond to an Order to Disapprove, an Order to Produce or an Order to Show Cause will be entered.

F.S. 744.3678(3) requires the guardian to preserve all the original receipts and cancelled checks along with other substantiating records for a period of three years after the guardian's discharge from the guardianship

Please note: If there is a topic you would like discussed in any of our upcoming monthly newsletter articles, please email it to aDiNatale@pinellascounty.org.

HOW TO CONTACT US: *If we can be of assistance, please call:*

Division of Inspector General, PIU 464-8371
Division of Inspector General, Fax 464-8386
Probate Court Records 464-3321
Guardianship Hotline 45-FRAUD (453-7283)



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1/8 page business card	\$ 50.00*

* Per month with 3 month minimum

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Deadline for ads with payment is the **20th** of each month. Same deadline for editorial copy. A complimentary copy of each issue is sent to our advertisers.

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Identification badges *with our New Logo* are available to members for \$15. Badges will be mailed to your address.

For information, contact
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NETWORKING BREAKFAST THE FOUNTAINS OF BOCA CIEGA BAY



JANUARY
27TH



Our January Breakfast Speaker
Officer Joel Quattlebaum,
pictured below, with new Guardian
Kristina Taylor,



*Congratulations
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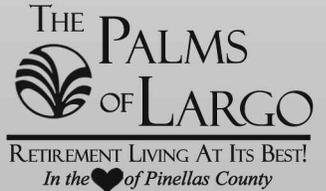


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DIVISION OF INSPECTOR GENERAL

R E P O R T



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AN INDEPENDENT SERVICE OFFERED BY KEN BURKE, CPA, CLERK OF THE CIRCUIT COURT & COMPTROLLER PINELLAS COUNTY, FLORIDA

Guardian Association of Pinellas County, Inc.

Membership Request

Membership Year: January 1 through December 31 MEMBERS PAYING NOW ARE GOOD THROUGH DECEMBER 2017!

Membership Application: [] New [] Renewal Date: _____

By joining the GAPC you are affirming that you have read the GAPC bylaws and the adopted Code of Ethics from the National Guardian Association. The GAPC Bylaws and NGA Code of Ethics are available on the Association website: www.GuardianAssociation.org

Guardian \$45.00 (must be a Guardian or taken the State Guardian Competency Exam) OPPG# _____

Affiliate \$60.00 (Non-guardian, Individual)

Corporate \$75.00 (company is owner of the membership, includes two members, transferable between employees)

**Heard about us / Referred by: (required) _____

Category for listing on GAPC website (Please check appropriate boxes and print legibly)

- Professional Guardian, Assisted Living Facility, Attorney, Care Manager, Other, Family Guardian, Nursing / Rehab Facility, Paralegal / Legal Assistant, Finance / Banking, Health Care Agency, Power of Attorney (POA), Government / Court Personnel

Name, Business Name/Organization, Address, City, State, Zip, County, Home Phone, Fax, Email Address, Website Address

Please make check payable to Guardian Association. Mail to GAPC, P.O. Box 1826, Pinellas Park, FL 33780 To apply or renew membership online, please visit our website at www.GuardianAssociation.org Pay Pal Preferred. For more information contact: 517-256-0403 or 813-409-7446.