NOMINEES FOR BOARD OF DIRECTORS

BOARD MEMBERS SERVE A TWO YEAR TERM

LORI CLARK is currently working as an LPN and has worked as an LPN in many outlets for the last 17 years. She is a graduate of Florida Professional Guardianship Training, Class of 2017. Lori is a member of the Guardian Association of Pinellas County.

HA DAO is an Attorney with Deeb Elder Law, PA. She worked previously as an Assistant Attorney General for 16 years. A member of the Guardian Association of Pinellas County, the National Academy of Elder Attorneys and the Florida Bar, Elder Law Section, Ha holds a Bachelor of Arts in Society and Justice and also a Juris Doctorate.

MELISSA FINLEY-WILLIAMS holds a Bachelors degree of Science in Psychology as well as a Juris Doctorate. She is founder of Finley Williams Law Firm, PA. focusing on estate planning and elder law. She received "Best of Tampa 2017″ along with Business in the Heart of Florida Magazine, “40 under Forty”. She holds certifications and many memberships, including Guardian Association of Pinellas County.

BRENDA JOYCE GRIESHEIMER is a Licensed Insurance agent for the State of Florida and has been Sales Manager at Veterans Funeral Care since 2013. Previously a Family Service Counselor for 6 years, Brenda is involved in many activities and is a member of the Guardian Association of Pinellas County.

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ASSOCIATION COMMUNICATIONS

Contact Info.

P.O. Box 1826
Pinellas Park, FL 33780
(517) 256-0403
Info@GuardianAssociation.org

Monthly Calendar

NOVEMBER 8, 9:30 A.M. GAPC BOARD MEETING
Palms of Largo - REGAL PALMS Bldg., VERANDAH ROOM

NOVEMBER 8, 11:30 A.M. ASSOCIATION MEETING
Palms of Largo - CYPRESS PALMS Bldg., 400 Lake Avenue NE, Largo, 1 CEU available

THERE WILL BE NO NETWORKING BREAKFAST THIS MONTH

Please RSVP to Association Website
FROM THE DESK OF THE PRESIDENT

Traci Samuel

THOUGHTS FROM THE PRESIDENT...

It is hard to believe that we are nearing the end of 2017. With this comes Thanksgiving and Christmas. In addition to the holidays, it is the time in which half of the Board of Directors’ seats are up for election.

We have received nine applications from those interested in serving you as a Board Member. Those who have applied will attend the November member meeting and share with you their interest in this opportunity. I hope you can all attend.

We will offer online voting via Survey Monkey November 1st-5th. We will also offer ballot voting which will be held during the November meeting.

Please take this time to ensure that your contact information is up-to-date and that your company indicates the correctly named individuals as members.

For those who are not elected, as well as any member in good standing, I would encourage you to get involved with sitting on a committee or possibly chairing a committee. After the new year, the meeting times and dates will be posted on our website.

Please reach out to info@guardianassociation.org with any questions and your email will be routed to a member of the Election Committee.

TRACI
Traci.Flguardianship@gmail.com

Follow Us on Social Media

Guardians and Healthcare professionals can exchange ideas, ask questions, seek solutions, build a network, and receive helpful info/updates through social messaging.
SHERI GRUDEN holds a Bachelors degree in Biblical Studies. Currently an Intake and Marketing Coordinator at Suncoast PACE for 8 years, and an On Call Manager at Aging Wisely for 4 years. She has several certifications along with serving on many committees and boards including Guardian Association of Pinellas County.

MICHELLE LOWMACK holds 3 certifications. Currently a Business Development Director for Home Care Assistance since 2016. Previously a Client Services Manager and a Scheduling Coordinator. A member of Guardian Association of Pinellas County.

DAVID MENNEKE holds a Bachelor degree in General Business Administration. Currently Treasurer of the Guardian Association of Pinellas County, he is the owner and operator of Florida Family Cremations, past Director of Operations for Advanced Medical Disposal and Executive VP of Splash Pools. David has been a member of the GAPC for 4 years.

TRACI SAMUEL is currently President of the Guardian Association of Pinellas County and a Professional Guardian. She attended Western Michigan University and Lansing Community College where she studied Respiratory Therapy. Traci previously worked at HCA as Director of Cardiopulmonary and Neurodiagnostics.

MARIA WINER graduated from the Professional Guardian Class of 2007. She is the owner of Maria’s Adult Day Care Center LLC which she started in 2013. Maria is a Professional Legal Guardian, bi-lingual interpreter and previously was a project engineer. She holds a Bachelor of Science in Production Engineering and is a member of Guardian Association of Pinellas County.
A MESSAGE FROM THE CLERK’S OFFICE

Just some helpful reminders and information for Professional Guardians:

- **Maintenance fees of Professional Guardians ($7.50) are due by January 31st of each year,** regardless of when you were appointed to a case. Guardians who mail in their payment, are encouraged to provide a self-addressed, stamped envelope to get their receipt sent back to them. Remember, these fees are per guardian, not per case.

- Often, Guardian Advocates are supposed to file an Individual Education Plan, or **Disabled Services Plan,** or Habilitation Plan in lieu of an Annual Guardianship Plan. However, if the ward is not in a facility or program that offers a plan, or you are on a waiting list to get a plan and your due date is approaching, please use the Initial or Annual Guardianship Plan offered on mypinellasclerk.org. This is a simple form to complete and will allow you to meet your due date.

- Per AO 09-36, “Each initial guardianship plan shall include a Disaster Plan, which sets forth the procedures and plans in place for the ward in the event an evacuation order or other emergency order is issued by federal, state, or local officials. The Disaster Plan shall take into account and reflect how each ward’s special needs will be met under the plan in the event the guardian or ward has relocated temporarily due to an evacuation order, emergency order, or other emergency situation. The Disaster Plan must be updated if the ward permanently changes residence or if a new guardian is appointed.” If the ward is not in a facility which provides a disaster plan, please use the form offered on jud6.org. This, too, is a very simple form to fill out and will meet the requirement.

- There has been a lot of confusion regarding **Trust Accountings and Audit Fees.** Pursuant to FS 744.3678(4), an audit fee is charged for the annual accounting in a guardianship case. The fee is based on the net amount of the ward’s assets and is paid through the portal at the time of filing. If a ward’s assets include any trust of which the ward is a beneficiary and which is under the control or administration of the guardian, the trust assets must be included in the annual financial return. For example: Annual accounting submitted with net non-trust assets of $25,000.00 as well as a trust with net assets of $200,000 would require fees of $85.00 for the initial inventory, and $170.00 for subsequent annual audits. Often, the accounting for non-trust assets and trust assets are filed as two separate documents. Ideally, they should be filed at the same time, as they are due at the same time and reflect two parts of a single estate. However, it may not always be practicable to do so. Therefore, to ensure proper calculation of fees:

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When filing both accountings at the same time, the annual accounting should be submitted as an “annual accounting” for the total amount of the ward’s assets, to assess the correct total fee. The trust-related accounting should be submitted as a “supplemental accounting.” A supplemental accounting does not generate a fee in the portal.

When filing an annual accounting first and the trust-related accounting at a later date, the annual accounting should be submitted as an “annual accounting” for the total amount of the ward’s assets, to assess the correct total fee. Additional correspondence should be attached indicating that the trust-related accounting will be following later.

When the trust-related accounting is submitted, it should be submitted as a “supplemental accounting” to avoid additional fees.

When the annual financial return includes just an annual accounting for the trust, it should be submitted as an annual accounting to assess the correct fee.

HOW TO CONTACT US:
Please feel free to contact the Probate Court Records department by calling (727) 464-3321, or the department manager, Jerome D. Jordan, at (727) 464-3003 or by email to probate@mypinellasclerk.org.

The GAPC is collecting items for the indigent seniors in our community. Items needed include, but are not limited to the following:

- Shampoo
- Hairbrush
- Combs
- Soap
- Toothbrush
- Toothpaste
- Incontinence Products
- Body Wash
- Nail Polish
- Nail Polish Remover
- Greeting Cards
- (with stamp included on envelope)
- Tissues
- Cosmetics (powder, blush, lipstick)
- Costume Jewelry
- Lotion
- Aftershave
- Cotton Balls

Please donate new, unopened items. Bring your donations to our monthly luncheon or monthly networking breakfast.

If you know of a senior in need of Everyday Essentials, please email: eegapc@gmail.com.