

# Guardianship Law in Practice: From Foundations to Advanced Strategies Two-Day Online Program

October 1 & 8, 2026 | Time: 1:00 – 4:30 PM EST

## Program Description

This two-day online program offers attorneys a comprehensive, practical exploration of guardianship law—guiding participants from core concepts to advanced, real-world application. Designed for both newer practitioners and experienced attorneys, the program equips attendees with the knowledge and tools needed not only to establish guardianships, but to effectively advise and support clients throughout the lifecycle of a case. With a strong emphasis on ethics, evolving standards, and day-to-day administration, this program bridges the gap between theory and practice.

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### Day One: Foundations & Core Concepts (New Practitioners or Refresher)

Day One focuses on the essential building blocks of guardianship practice, making it ideal for attorneys who are new to this area or looking for a refresher. Attendees will gain a clear understanding of how to establish guardianships, evaluate and implement less restrictive alternatives, and navigate the legal framework governing these proceedings.

Key topics include:

- The fundamentals of guardianship proceedings and court processes
- Evaluating capacity and exploring less restrictive options
- Recent updates to Model Rule 1.14 and their practical implications
- The legal, ethical, and fiduciary duties of guardians after appointment

This day ensures participants leave with a strong foundation and confidence in handling guardianship matters from the outset.

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### Day Two: Advanced Strategies & Practical Application

Building on the foundational knowledge from Day One, Day Two dives into complex and nuanced issues that arise in guardianship practice. This session is designed for attorneys seeking to deepen their expertise and better support clients in challenging situations.

Key topics include:

- Advising guardians on day-to-day administration and compliance
- Ethical decision-making and evolving professional responsibility standards
- Interstate guardianship transfers and restoration of rights
- Advance directives and end-of-life decision-making
- Financial management, recovery strategies, and avoiding fiduciary breaches

Participants will gain practical strategies for navigating high-stakes scenarios and ensuring effective, compliant guardianship management.

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### **Why You Should Attend**

Too often, attorneys assist clients in establishing guardianships but provide little guidance afterward—leaving guardians unprepared to meet their responsibilities. This gap can result in confusion, compliance issues, and even the need for successor guardians.

This program is designed to change that. You'll learn how to:

- Provide ongoing, practical counsel to guardians beyond initial appointment
- Anticipate and prevent common pitfalls and fiduciary missteps
- Navigate complex ethical and legal challenges with confidence
- Deliver greater value to your clients by supporting them through the full guardianship process

Whether you're building your foundation or enhancing your expertise, this program will give you the tools to practice guardianship law more effectively—and with greater impact.

Date: October 1, 2026 | 1:00 – 4:30 PM EST (each day)

### **Day One: Foundations of Guardianship Practice**

1:00 – 1:10 PM Welcome & Opening Remarks

1:10 – 2:10 PM **Session 1: Guardianship Fundamentals – Mechanics & Alternatives**

By the end of this session you will be able to:

- Understand the process for establishing guardianship, including required procedures, forms, and medical evidence
- Differentiate between plenary and limited guardianships
- Compare guardianship with powers of attorney and other less restrictive alternatives
- Recognize the basics of restoration proceedings

- Identify the core duties of guardians of the person and estate, including reporting, asset management, care decisions, and when court approval is required

**Speaker:** Amy Kessler, Esq.

2:10 – 2:20 PM Break

2:20 – 3:20 PM - **Session 2: Ethics in Guardianship Practice**

By the end of this session, participants will be able to identify ethical responsibilities in guardianship practice, including client representation, navigating dilemmas, and applying ABA Model Rule 1.14.

**Speaker:** Ed Boyer, CAP, Fellow

3:20 – 4:20 PM **Session 3: Duties and Responsibilities of a Guardian --Duties of a guardian, for both estate and personal guardians.**

By the end of this session, participants will be able to:

- Distinguish between guardians of the person and estate
- Identify key duties, including inventories, care plans, and reporting
- Apply basic asset management and budgeting practices
- Explain medical and placement decision-making responsibilities
- Recognize when court approval is required

**Speaker:** TBD

## **Day Two: Advanced Issues & Emerging Challenges**

1:00 – 1:10 PM Welcome Back & Key takeaways from Day One

1:10 – 2:10 PM **Session 4: Interstate Transfers & Restoration of Rights**

- Understand the process for interstate guardianship transfers and related jurisdictional issues
- Identify legal standards and procedures for restoration and termination of guardianship
- Recognize common challenges and best practices in multi-state guardianship matters

**Speaker:** Tamara Trujillo, CELA

2:10 – 3:10 PM **Session 5: Advanced Directives & End-of-Life Decision Making**

- **Understand** the guardian's role in healthcare and end-of-life decision-making
- **Explain** the relationship between guardianship and advance directives

- **Identify** key legal and practical considerations in end-of-life care decisions

*Speaker: Charles Golbert, Esq.*

3:10 – 3:20 PM Break

3:20 – 4:20 PM **Session 6: Financial Recovery in Guardianship Cases**

- **Identify** strategies for locating and recovering assets in guardianship cases
- **Understand** key litigation approaches to support financial recovery efforts
- **Navigate** effective collaboration with financial institutions and courts

*Speaker: Dawn Lawkowski-Keller, Esq.*