

Day 1

Times (SUBJECT TO CHANGE) CEUs

7:30 am – 8:30 am
 8:00 am - 8:45 am
 8:45 am - 9:00 am
 9:00 am - 9:15 am

Continental Breakfast and Registration - Ballroom
 Membership Meeting - Ballroom
 Break
 Welcome and Introduction of Sponsors - Jim Smith and Julie Brown, AFA Executive Directors

9:15 am - 10:00 am
 10:00 am - 10:15 am
 10:15 am - 11:45 am

0.75

Keynote (Plenary Session) Better Lives through Better Practices – L'Don Sawyer, Director of Senior Services at Tucson Medical Center

Breakout Track 1 - Reddington Room		Breakout Track 2 - Ballroom	
Fiduciary 101 – The Fundamentals		Advanced Topics	
Topic	Speaker	Topic	Speaker

The Basics: Quizzes This session targeted to trainees wanting to prep for Fiduciary Exam, licensees who want to refresh their knowledge, or unlicensed staff needing a primer.	Maricopa County Public Fiduciary Staff: Donna Morrison, Vinay Singh, Linda Childress, Ellen Riddick	Handling Difficult Parties in Cases	Robert Fleming, Esq., Fleming & Curti, PLC
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11:45 am - 12:45 pm

1.5

Lunch
 (ETHICS) Plenary session: Avoiding Fiduciary Litigation – T.J. Ryan, Esq., Frazer Ryan Goldberg & Arnold, LLP, President of the Maricopa County Bar Association - Ballroom
 Break

12:15 pm - 1:30 pm
 1:30 pm -1:45 pm
 1:45 pm - 2:00 pm
 2:00 pm - 3:30 pm

1.25

Breakout Track 1 - Reddington Room		Breakout Track 2 - Ballroom	
Topic	Speaker	Topic	Speaker

Fiduciary Policy Reference Guide: Comprehensive Review	Dawn Walters and Crismon Cooper	IT for the Fiduciary Office: Technology, Privacy, The Cloud	Tim Greer, MicroSupport, Inc.
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3:30 pm - 3:45pm
 3:45 pm - 4:45 pm

1.5

Breakout Track 1 - Ballroom		Breakout Track 2 - Reddington Room	
Topic	Speaker	Topic	Speaker

Potential: Valuation, Management and/or Sale of Real Estate Assets.	Beth Jo Zeitzer, ROI Properties	Best practices to protect against bonding claims	James Smith, Bond Services of Arizona
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Total CEUs

6

Day 2

Time (SUBJECT TO CHANGE)

CEUs

7:30 am - 8:30 am		Full Breakfast and Registration			
8:00 am - 8:45 am	0.75	Guardian Wars – Craig Wisnom, Licensed Fiduciary and Attorney with Bogutz & Gordon, P.C			
8:45 am - 9:00 am		Break			
9:00 am - 10:30 am		Breakout Track 1 - Ballroom Accounting/Conservatorship Topic		Breakout Track 2 - Reddington Room Guardianship Topic	
		Topic	Speaker	Topic	Speaker
10:30 am - 10:45 am	1.5	Quickbooks/Quicken:	Jonathan Powell and Tiffany Powell,	Hospice: Changes to Medicare Regulations; Hospice for Behavioral Health Patients	Carol Stapleton, Hospice Family Care Tucson
		Customized Reports for Court Accounting	Sapphire Bookkeeping & Accounting, Inc.		
				Break	
10:45 am - 12:15 pm	1.5	SNT and Benefits Planning - Ana Perez-Arrieta, Esq., Bogutz and Gordon - Ballroom			
12:15 pm - 1:15 pm		Lunch			
12:35 pm - 12:45 pm		Raffles for Sponsor Prizes - Ballroom			
12:45 pm - 2:00 pm 2:00 pm - 2:15 pm	1.25	(ETHICS) PLENARY SESSION: If I Only Knew Then What I Know Now...Ethical Client Selection Tips – Stephanie Bivens, Esq., Bivens & Associates and Roger Coventry, Childers & Berg - Ballroom			
		Break			
2:15 pm - 3:45 pm	1.5	SMI Panel: Working with Clients with Serious Mental Illnesses - John Barron, Esq., Barron & Associates, P.C., Terri Waldman, Director of Geropsych at Tucson Medical Center and Jeanette Bloss, JSB Fiduciary & Estate Management Services, LLC - Ballroom			
Total CEUs	6.5				