

Plan Now to Join Us for the
AFA 2020 SPRING CONFERENCE
"Making a Difference"

THE ARIZONA
Fiduciaries
Association

AFA 2020 SPRING VIRTUAL CONFERENCE
Monday April 20, 2020 – Friday April 24, 2020
Two 1-Hour Sessions with a 10 Minute Q&A Daily from 2:00 – 4:30 pm

The 2020 AFA "Virtual" Conference – consisting of a series of 10 webinars - is eligible for **10.00 hours of CE credit**, including 4 hours of Ethics credit. **The cost for the full conference series is \$175 Individual AFA Members: \$125 for AFA Business Members and \$250 for Non-members.** Attendees registered for the 2020 Spring Conference can apply their registration fees to the virtual conference and be refunded any remaining fees. [Please use this link](#) to indicate your intent.

Each event will last approximately 1 hour with 10 minutes of Q&A and a 10-minute break in between sessions. Upon completion of the webinar series, you will also have access to the presenter's materials (usually a PowerPoint), and a recording of the event if you want to review a key point after the presentation.

Upon completion of this event, a general certificate of attendance will be emailed out to all attendees who remain on the line for at least 50 minutes for EACH event. All you need in order to participate in each online, interactive session is a **computer, Internet access, and a phone line.**

For more information or to register for this event, visit www.azfid.org

Monday, April 20, 2020

2:00 – 3:10 pm Fee Guideline Review - 1 Contact Hour/Ethics

Emily Kile, Esq. Kile & Kupiszewski Law Firm & Commissioner Jane McLaughlin, NE Regional Court Center, Maricopa County

3:20 – 4:30 pm Trust Administration Changes - 1 Contact Hour

Gary Fletcher, Esq., Nystedt and Fletcher, PLLC

Tuesday, April 21, 2020

2:00 – 3:10 pm ALTCS Update 1 Contact Hour

Caleb Lihn, Esq., Taylor & Lihn, PLLC

3:20 – 4:30 pm The Fiduciary and the Power of Attorney Appointment - 1 Contact Hour/Ethics

Shannon Derksen, Esq., Duffield Adamson & Helenbolt, P.C.

Wednesday, April 22, 2020

2:00 – 3:10 pm **Establishing a Guardian Plan** - 1 Contact Hour/.5 Ethics

Roger Coventry and Coy Vernon, Childers & Coventry

3:20 – 4:30 pm **Tangible Personal Property Challenges** - 1 Contact Hour

Erik Hoyer, EJs Auction & Jason Cobb, Compass Fiduciary Group, LLC

Thursday, April 23, 2020

2:00 – 3:10 pm **What Every Prudent Investor Needs to Know** - 1 Contact Hour/.5 Ethics

Robert Fleming, CELA, Fleming & Curti

3:20 – 4:30 pm **ALTCS Fundamentals for Fiduciaries: Spend Down Solutions for your Wards/Beneficiaries** - 1 Contact Hour

Charlotte Johnson, Esq., Davis Miles McGuire Gardner

Friday, April 24, 2020

2:00 – 3:10 pm **Boundaries of the Fiduciary** - 1 Contact Hour/Ethics

James Lee, Senior Bar Counsel, State Bar of Arizona - Invited

3:20 – 4:30 pm **Working Remotely with our Clients/Wards Roundtable** - 1 Contact Hour

Jeanette Bloss, Moderator

**SAVE THE DATE: Friday, October 23, 2020
2020 AFA Fall Workshop at the
High-Country Conference Center Flagstaff, AZ**

Things I Have Learned as a Fiduciary

J.R. Rittenhouse, Rittenhouse Fiduciary Services, LLC & Stephanie Bivens, Esq., Bivens & Associates

In Depth – An Understanding of Dementia

*James Fitzgerald, Director of Public Policy & Advocacy & Kinsey McManus, Director of Programs
Alzheimer's Association Desert Southwest Chapter*

The Unique Challenges of a Public Fiduciary

Peter Santini, Pima County Public Fiduciary, Other Panelists – TBA

Update on New Probate Rules in Effect

Alisa Gray, Esq., Chelsea Hesla, Esq., & Justin Nelson, Esq., Tiffany & Bosco