

THE ARIZONA *Fiduciaries* Association

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

Thursday, April 30 – Friday, May 1, 2020
CIVANA Wellness Resort & Spa | Carefree, AZ

AFA 2020 SPRING CONFERENCE SCHEDULE OF EVENTS

THURSDAY APRIL 30, 2020 – Eligible for 6.5 CEUs (Including 2.25 Ethics)

7:00 am - 7:45 am	Registration/Breakfast
7:45 am - 8:00 am	Welcome Remarks <i>Jeanette Bloss, AFA President</i>
8:00 am - 8:45 am	AFA Membership Meeting
8:45 am - 9:00 am	Break
9:00 am - 10:30 am	Keynote Address: Things I Have Learned as a Fiduciary <i>J.R. Rittenhouse, Rittenhouse Fiduciary Services, LLC</i> <i>Stephanie Bivens, Esq., Bivens & Associates</i>
1.5 CEU Credits Including .5 Ethics	
10:30 am - 10:45 am	Coffee Break/Visit with Exhibitors
10:45 am - 12:00 pm	General Session: Boundaries of the Fiduciary <i>James Lee, Senior Bar Counsel, State Bar of Arizona</i> <i>Richard Palmatier, Esq., Assistant General Counsel, State Bar of Arizona</i>
1.25 CEU Credits Including 1.25 Ethics	
12:00 pm - 1:00 pm	Networking Lunch
1:00 pm - 2:15 pm	Concurrent Breakout Sessions
1.25 CEU Credits Including .5 Ethics	1A: Establishing a Guardian Plan <i>Roger Coventry and Coy Vernon, Childers & Coventry</i>
1.25 CEU Credits Including .5 Ethics	1B: Trust Administration Changes <i>Gary Fletcher, Esq., Nystedt and Fletcher, PLLC</i>

2:15 pm - 2:30 pm Coffee Break/Visit with Exhibitors

2:30 pm - 3:45 pm Concurrent Breakout Sessions

1.25 CEU Credits

2A: ALTCS Fundamentals for Fiduciaries: Spend Down Solutions for your Wards/Beneficiaries - *Charlotte Johnson, Esq., Davis Miles McGuire Gardner*

1.25 CEU Credits

2B: Tangible Personal Property Challenges
Erik Hoyer, EJs Auction & Jason Cobb, Compass Fiduciary Group, LLC

3:45 pm - 4:00 pm Coffee Break/Visit with Exhibitors

4:00 pm - 5:15 pm General Session: ALTCS Update

1.25 CEU Credits

Caleb Lihn, Esq., Taylor & Lihn, PLLC

5:30 pm – 6:30 pm “Happy Hour” - Sponsored by Bond Services & Arizona Bank & Trust

FRIDAY, May 1, 2020 – Eligible for 6.25 CEUs (Including 2.25 Ethics)

7:00 am - 8:00 am Breakfast/Visit with Exhibitors

8:00 am - 9:15 am General Session: What Every Prudent Investor Needs to Know

1.25 CEU Credits
Including .5 Ethics

Robert Fleming, CELA, Fleming & Curti

9:15 am - 9:30 am Coffee Break

9:30 am - 10:45 am Concurrent Breakout Sessions

1.25 CEU Credits
Including .5 Ethics

3A: Don't Be a Lone Wolf: A Fiduciary's Duty to Seek Financial/Legal/Tax Guidance – *Robert Fleming, CELA, Fleming & Curti*

1.25 CEU Credits

3B: The Unique Challenges of a Public Fiduciary
Peter Santini, Pima County Public Fiduciary, Other Panelists - TBA

10:45 - 11:00 am Coffee Break/Visit with Exhibitors

11:00 am - 12:15 pm General Session: “In Depth – An Understanding of Dementia”

1.25 CEU Credits

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

12:15 pm - 1:15 pm AFA Awards Luncheon/Raffles

1:15 pm - 2:30 pm Concurrent Breakout Sessions

1.25 CEU Credits
Including 1.25 Ethics

4A: Fee Guideline Review
Emily Kile, Esq. Kile & Kupiszewski Law Firm
Commissioner Jane McLaughlin, NE Regional Court Center, Maricopa County

1.25 CEU Credits
Including 1.25 Ethics

4B: The Fiduciary and the Power of Attorney Appointment
Shannon Derksen, Esq., Duffield Adamson & Helenbolt, P.C.

2:30 pm - 2:45 pm Coffee Break/Visit with Exhibitors

2:45 pm - 4:00 pm Closing General Session: Update on New Probate Rules in Effect

1.25 CEU Credits

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