



FSGATM
Florida State
Guardianship Association

BULLETIN

VOLUME 5-11



Membership News

Since its inception, FSGA's membership year has run from April 1 to March 31. To simplify this process, we are aligning our membership cycle with the calendar year. Starting this year, memberships will now begin on January 1 and end on December 31, making it easier to remember and manage.

Membership renewals for 2025 will open on December 1, 2024, and we encourage everyone to renew by January 2025. As a gesture of appreciation, members who renew by January will receive a complimentary three-hour training session titled Ethics and the Law: Series II—an in-depth exploration of civil rights and ethical dilemmas. This training will be held on February 6, 2025, at the FSU Alumni Center (Rendina Room), located at 1030 W. Tennessee St. in Tallahassee. Members can attend in person or virtually. This session, valued at \$100, will be offered free to those who renew by this date, and eligible members will receive a coupon for access.

For those in larger organizations, please reach out to our executive office for assistance with your renewal process.

We appreciate your understanding and support as we transition to a streamlined, calendar-based membership year.

Your Voice, Your Impact: Renew with FSGA

For over three decades, the Florida State Guardianship Association has steadily expanded, now encompassing more than 600 dedicated members spread across 15 chapters statewide. As a collective voice, we champion the rights of guardians and those entrusted to their care. This year, our focus remains steadfast: to offer impactful and energizing educational resources, lead on a platform of robust legislative advocacy in support of guardianship, and facilitate opportunities for networking and collaboration. Renew today to stay active and be the catalyst for meaningful change.



**Our Members
Serve Over 45,000
clients in the state
of Florida.**

IMPORTANT UPDATE FOR MEMBERS: CHANGES TO THE CE BROKER SYSTEM

As many of you are aware, there have been recent changes to the CE Broker system. As part of these updates, the required Continuing Education (CE) hours for guardians have increased from 16 to 30, with specific requirements in the following areas:

- 2 hours in Fiduciary Responsibility
- 2 hours in Professional Ethics
- 1 hour in Advance Directives
- 3 hours in Abuse, Neglect, and Exploitation
- 4 hours in Guardianship Law

New CE Broker reporting numbers have been issued to all guardians. If you have not yet received your new number, you can look it up on the OPPG website.

Trouble Accessing Your New CE Broker Account?

If you're having difficulty accessing your new CE Broker account, we recommend contacting OPPG directly and requesting that they resend the CE Broker welcome email. This email provides the portal access to your new account.

Missing or Misallocated Credits?

Some members have reported missing credits or credits that have been placed in the wrong categories. If you experience this issue, please reach out to the provider of your course to resolve it. During the migration, some data may have been lost, which could explain these discrepancies.

Multiple Accounts?

If you have multiple accounts in the system, please contact OPPG for guidance on how to consolidate or address the issue.

New! FSGA CEU Diary

To assist our members with tracking Continuing Education, FSGA has created a CEU diary, which is available as a membership benefit. This tool allows you to log the CEU courses you have completed, serving as a backup to the CE Broker system. It also provides a convenient way to ensure that your courses have been uploaded correctly and into the appropriate categories. Additionally, the CEU diary generates a clean, printable report in case you need to provide verification of your CEUs to local authorities.

You can access the CEU Logbook by logging into the FSGA website and navigating to the member area. For a quick overview of how to use the logbook, please watch this brief 3-minute video: [How to Use the CEU Logbook](#).



We hope these tools and tips help you navigate the new system smoothly. Thank you for your continued commitment to professional development.

The Florida Guardianship Foundation

The Florida Guardianship Foundation is a 501(c)(3) nonprofit dedicated to advancing education and promoting the expertise and competence of Florida's guardianship professionals. Our mission is to ensure that individuals with diminished capacity receive exceptional, ethical care in guardianship and health services.

This year, the Foundation, in partnership with the Florida State Guardianship Association (FSGA) and the Florida Bioethics Network, is hosting a series of three events dedicated to a multidisciplinary exploration of ethics and advocacy in guardianship. The first event, held in Miami on November 17, 2024, was a resounding success, attracting over 120 attendees in person and an additional 20 participants at the satellite location at Jewish Family Services in Palm Beach.

The next installment in the series, Ethics and the Law: Series II, will take place virtually from Tallahassee on February 6, 2025.

[For more information, please visit our webpage here.](#)



ETHICS AND THE LAW SERIES II

**FEBRUARY
6TH
2025**

FSU Student Alumni Center
Tallahassee and VIRTUALLY

**SAVE
THE
DATE**

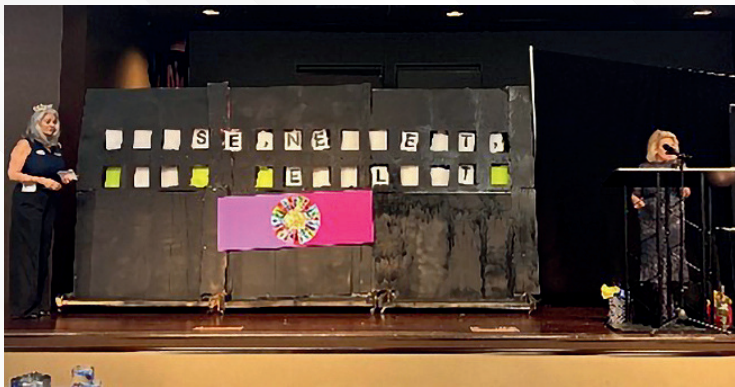


Broward County Guardianship Association Education Day

Broward County Shines Again with an Unforgettable Education Day

Broward County once again captivated attendees with its remarkable annual Education Day. This year’s theme, **game shows**, brought an extra dose of energy and excitement, leaving participants thoroughly impressed.

The event featured an impressive lineup of speakers, including **Congresswoman Debbie Wasserman Schultz** and **The Honorable Judges Nicholas Lopane and Natasha De Primo**, who inspired and educated attendees with their insights. Adding to the fun, the day incorporated real game-show experiences such as Wheel of Fortune, Family Feud, and Jeopardy, engaging participants in a creative and interactive way.



A particularly heartwarming moment came when **professional guardian Marilyn Brew from the Keys** received a special grant of **\$1,500**. These funds were crucial in helping her ward meet the financial requirements to transition into a new assisted living facility, along with some extra support for personal essentials.

The day was not just a celebration of education and community engagement—it was a powerful reminder of the difference collective efforts can make in the lives of those in need. Once again, Broward County has set a gold standard for generosity, creativity, and impact.

One of the highlights of the event was the Broward County Chapter’s **generous giveaways for indigent wards**, showcasing the community’s commitment to improving lives. The chapter gifted over \$3,000 in American Express gift cards, which will help guardians purchase essential items for their wards, such as clothing, hygiene products, hair services, outings, and celebrations.

In addition, the chapter has already approved requests for an additional **\$4,250** in gift cards. These funds will soon be distributed to guardians who submitted the necessary forms, further supporting the needs of the community’s most vulnerable members.



8 Ways to Craft a Financial Plan for Individuals with Limited Resources



Fiduciaries and guardians play a vital role in managing the affairs of individuals who may be unable to do it themselves. Creating a financial plan requires a strategic approach that not only benefits your client, but reduces your overall investment related liability.

As experts in navigating the unique aspects of trustee investing, here are our top 8 tips on how to craft a suitable financial plan for your clients with limited resources.

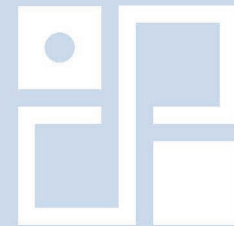
- Don't ignore the existing investments when reviewing a case.
- Choose an investment advisor who understands your needs as a fiduciary.
- Develop a detailed plan that outlines all sources of income and monthly expenses.
- Allow the investments time to grow before spending down.
- Control the expenses associated with the investments.
- Don't sit on cash too long - make it productive.
- Review and update the financial plan with the investment advisor periodically.
- Delegate liability through regular communication and documentation.

The key is to build a plan that is sustainable, adaptable, and aligned with your client's goals, while also adhering to legal and ethical standards.

If you're looking for an advisory partner that provides expert guidance and support when managing your clients' investments, we invite you to connect with a Prudent Investors advisor today at www.prudentinvestors.com.



**Click or scan to schedule
a meeting with
Prudent Investors.**



About Us

Prudent Investors is a fee-only, SEC-registered investment advisor providing portfolio management and financial planning services under a fiduciary standard of care.

We specialize in asset management for both professional fiduciaries (trustees, guardians, and conservators) and households seeking diversified investment solutions. We are experts in helping our clients navigate the unique aspects of trustee investing, including compliance with the Uniform Prudent Investor Act (UPIA).

Connect with Us

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SPACE COAST CHAPTER DEVELOPMENT

It's been a busy few months for the Space Coast Chapter. For many years, the members of the board have pursued a union between the Space Coast Chapter and the Space Coast Guardianship Association, a long-standing independent organization supporting the efforts of guardians and related professionals, both of which operate in Brevard County. After numerous meetings and mutual agreements, the like-minded boards and members celebrated the merger of the two organizations. The union culminated at a packed meeting on August 27, 2024, with 70+ people in attendance. Sheriff Wayne Ivey delivered statistics, trends and stories of the courageous efforts of local law enforcement and partnering agencies to combat and protect the most vulnerable in our community against scams and exploitation.

On September 24th, Deidre Shubert, MS, BCBA with Flourish Research highlighted the staggering statistics of Alzheimer's disease, as the 6th leading cause of death in the country, and the impacts on patients, their families and caregivers. She continued to inform the attendees of the risk factors, biomarkers, FDA approved medications and the ground-breaking developments in detection, treatment, slowing of progression and reversal of symptoms.



On October 22nd, Tiffany Overath, MSW, LCSW with Journey Forward Counseling, LLC provided an insightful look into the Science of Sleep. She exposed the relationship between insomnia and mental health. She reviewed the sleep cycles and the effects of disruptions as well as the impacts coupled with cognitive deficits. It was a very interesting discussion for the attendees, and an exploration into the challenges experienced by our Wards and their caregivers.

Growth & Success

The members of the Space Coast Chapter are looking forward to welcoming Judge Tesha Ballou to speak at the December 10th meeting as her first appearance before the guardianship stakeholders since coming into the division in July 2024. There will be limited attendance as we expect a full house.

The chapter has experienced continuous growth over the past few months with the "merge" and increased interest in the guardianship community.

