



FSGA Advocacy Week in Tallahassee: Advancing Guardianship and Support for the Community

Fifteen members of the Florida State Guardianship Association (FSGA), including six representatives from Broward County, recently convened in Tallahassee to advocate on behalf of the organization's 650 members. This visit to the state capital was an important opportunity to educate legislators about guardianship issues and to provide valuable resources for individuals and communities with questions regarding guardianship and its alternatives.

In addition to a training program, the advocacy trip included numerous meetings with legislators and agency staff, all focused on supporting FSGA members and enhancing the lives of individuals with disabilities. The collective efforts of the attendees further strengthened our advocacy for positive legislative changes and resources for those who need them most.



Special Thanks to our FSGA representatives:

Pam Wiener, Gina Rossi, Carlos Mc Donald, Barbie Stone, Pam Keller, Jetta Getty, Diana Shields, Joseph Bensmihen, Cindy Kramer, Bambi Williams, Michael Julian, Carine Droussos, Richard Stark, Holly Thomas, David Hunt



FSGA meeting with Lt. Governor Jeanette Nuñez

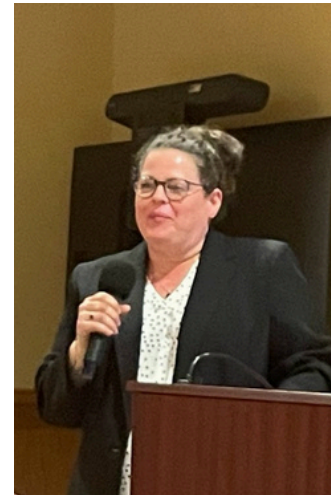
SEPTEMBER 29 Ethics and the Law II

The week of advocacy culminated in a collaborative event with the Big Bend Guardianship Association and the Florida Guardianship Foundation. Together, we hosted the second installment of our ethics training program, "Ethics and Law II." Held at the Florida State University Alumni Association, the event was attended by approximately 40 participants in person and over 200 participants online from across the state. The program featured an exceptional lineup of speakers, including:

Ray E. Moseley, PhD, Associate Professor of Bioethics, Law, and Medical Professionalism, and Director of Clinical Ethics Consultation at UF Shands Hospital

Kenneth Goodman, PhD, FACMI, FACE, Founder and Director of the Institute for Bioethics and Health Policy at the University of Miami Miller School of Medicine

Caitlyn Clibbon, Director of Community and Healthcare Services at Disability Rights Florida



FSGA meeting with Representative John Snyder

This event was a tremendous success, as it provided attendees with critical insight into ethics in guardianship while fostering an important discussion on law and healthcare policy.

Don't miss the final installment, Ethics and the Law III, being held at the **FSGA 38th Annual Conference, July 24 and 25 at the Rosen Plaza Orlando.**



Sponsored By:



CONTINUING EDUCATION FOR GUARDIANS: IMPORTANT UPDATES AND GUIDELINES

Over the past few years, there have been several important changes to the Continuing Education Unit (CEU) requirements for guardians. To ensure you are in compliance, we want to provide you with the following resources and guidelines:

1. CEU Logbook: Please use the CEU logbook available in your FSGA member account to track your CEUs. This tool will help you monitor your progress and ensure that your credits are uploaded correctly. To learn how to use the logbook, please watch this short instructional video: [CEU Logbook Tutorial](#).

2. Assistance with FSGA Courses: FSGA can assist you with questions regarding courses you have taken through FSGA only. However, we are unable to provide support for CEUs earned through other providers.

3. Self-Reporting Prohibition: Guardians are not permitted to self-report CEUs from other continuing education courses. Courses taken from external providers must receive prior approval from the Office of Public and Professional Guardians (OPPG) before being counted towards your CEU requirements. Please note that the OPPG cannot approve self-reported credits.

4. Accessing Your New CE Broker Account: If you encounter any difficulties logging into your new CE Broker account, please contact the OPPG directly for assistance with accessing your account.



**YOUR
ALLIANCE
WORKING
FOR YOU**



Stay informed and compliant with the latest CEU requirements for guardians. Utilize our CEU logbook to track your progress and ensure accurate credit uploads. For further assistance or questions about FSGA courses, reach out to us directly—we're here to help you navigate these essential guidelines seamlessly

EXPLORING NEW HORIZONS THROUGH EXPERIENCE AND DETERMINATION



FSGA 38TH ANNUAL CONFERENCE

25 JULY
2024 & 25

Rosen Plaza Orlando Florida

Join FSGA July 24 & 25, 2025 for the 38th Annual Conference at the Rosen Plaza in Orlando, Exploring New Horizons, a two day educational event with 300 plus in person attendees and over 200 joining virtually.

Exploring New Horizons

Our annual event will strengthen your business, linking you with prominent professionals in the field. Hundreds of guardians, attorneys, fiduciaries, social workers and healthcare professionals come together for continuing education and to learn about the innovative products and solutions in the field of guardianship, conservatorship, case management, healthcare and more.

[LINK FOR REDUCED ROOMS AT ROSEN PLAZA](#)

Sponsorship

As Sponsors, your exposure is an essential part of the education and networking program. Our sponsorship comes with the state-of-the-art Whova app, which brings our in-person and virtual attendees together. Sponsors can set up a virtual booth, upload video, hold a showcase or demonstration, network with conferees and easily download contacts.

[Click here to secure your sponsorship](#)

Whova

Registration Opening Soon!



SPONSORSHIP LEVELS

FSGA 38TH ANNUAL CONFERENCE, JULY 24TH - 25TH

Peak Sponsor - \$9500.00

- Name and logo displayed during Speakers Reception/Karaoke
- Logo Cocktail napkins
- Hospitality Suite for duration of the conference
- Complimentary Suite for Two Nights
- Top placement/prominent signage
- Exhibitor package with most prominent booth display
- Newsletter Feature Article prior to the conference

Summit Sponsor - \$8000.00

- Name and logo displayed during Speakers Reception
- Hospitality Suite for duration of the conference
- Introduction and 5 minutes to address attendees
- Top placement/prominent signage
- Exhibitor package with prominent booth display
- Logo on Hotel Room Key Cards
- Newsletter Feature article prior to the conference

Trail Blazer - \$5,000.00

- Hospitality Suite use for the duration of the conference
- Name and logo displayed during Luncheon
- Introduction and 5 minutes to address attendees
- Top placement/prominent signage
- Company name and logo on advance materials and messaging
- Exhibitor package with prominent booth display

Pathfinder - \$3,500.00

- Name and logo displayed during Meal/break
- Introduction and 3 minutes to address attendees
- Top placement/prominent signage
- Company name and logo on advance materials and messaging
- Complimentary Exhibitor package
- Registration and meals for two

Sherpa - \$3,000.00

- Logo on Conference tote bags
- Company name and logo on advance materials and messaging
- Complimentary Exhibitor package

Rockface - \$3,000.00

- Sponsor of the Whova App - name tags
- Logo on App home screen
- Company name and logo on advance materials and messaging
- Complimentary Exhibitor package

Awards Reception (7.23.2025) - \$2,000.00

- 3-minute speaking spot at reception
- Prominent Signage
- Exhibitor Package

Base Camp - \$1,500.00 Exhibitors enjoy BOTH in person and virtual benefits with the Whova App

LIVE

- Skirted Table, chairs
- Two conference registration including meals and speakers' reception
- Company name and logo on advance materials and messaging
- Registration and meals for two

VIRTUAL

- Virtual Booth in Whova our conference app for both in person and virtual attendees
- Virtual interaction opportunities for weeks leading up the conference
- Ability to easily download conference/contact information
- Use of Whova App to create showcase, set up a product demonstration, upload video, schedule office hours for questions and so much more

Treeline - Form Sponsor - \$600.00

- Logo on all CEU forms

Ridgeline - \$150.00

- Logo or business name on a table stanchion
- A conference supporter pin to wear at the conference identifying your contribution

[Click here to secure your sponsorship](#)

Secure your Sponsorship online NOW at www.floridaguardians.com

Join us for FSGA's 38th Annual Conference and we look forward to the opportunity to showcase your company to 300 attendees - Florida's best in the field of guardianship, including guardians, attorneys, fiduciaries, court personnel, care managers, paralegals, nurses, physicians, medical providers, case managers, ALF/SNF administrators and staff, educators and more!

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.

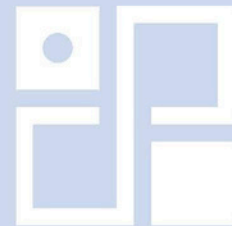
- Don't ignore the existing investments when reviewing a case.
- Choose an investment advisor who understands your needs as a fiduciary.
- Develop a detailed plan that outlines all sources of income and monthly expenses.
- Allow the investments time to grow before spending down.
- Control the expenses 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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