

MARK YOUR CALENDAR

February 20, 2019 (Edmonton)

February 27, 2019 (Calgary)



Legal Education
Society of Alberta

Adult Guardianship & Trusteeship Fundamentals



Explore adult guardianships and trusteeships from start to finish.

Get tips for managing represented adult matters, and learn key strategies to help set up guardians and trustees for success.

Visit LESA.org for full program details and registration options.
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Legal Education
Society of Alberta

FEB
20
2019

EDMONTON

Chateau Louis Hotel
& Conference Centre
11727 Kingsway NW
9:00 AM-4:30 PM

FEB
27
2019

CALGARY

The Glenmore Inn
& Convention Centre
1000 Glenmore Court SE
9:00 AM-4:30 PM



PROGRAM MATERIALS

Materials for this program will be provided to all registrants in electronic format only and will be available for download in advance.

CHAIR

Janice M. Bruni QC | Bruni Law | Calgary

FACULTY

Amanda L.C. Bruni | Bruni Law | Calgary (*Calgary only*)

Victoria Jones | de Villars Jones | Edmonton

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Gordon VanderLeek | VanderLeek Law | Calgary

Ronaliz S. Veron | Bruni Law | Calgary (*Edmonton only*)

Shelley E. Waite TEP | McLeod Law LLP | Calgary

WHO SHOULD ATTEND

This program is intended for lawyers who are new to AGTA matters or who want to revisit the basics.

THANK YOU The success of our programs relies on the generous contributions of time, talent, and energy from all our volunteers. We greatly appreciate the work of our volunteers and their service to the profession.

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Adult Guardianship & Trusteeship Fundamentals

The Initial Interview

Explore how to assess decision-making options properly, and discover when it may be valuable to assign supportive or substitute decision-makers. Learn about starting new applications, including the review or removal of existing guardians, trustees, agents, or attorneys. Delve into informal trustee arrangements and options available for less intrusive measures. Gain insight into incorporating existing legal documents, and examine processes for obtaining both guardianship and trusteeship orders. Learn strategies for dealing with costs, retainers, potential conflicts or disputes, and referrals to the Office of the Public Guardian or Office of the Public Trustee.

Getting Started

Consider capacity assessment requirements. Develop strategies to address common issues, including who to appoint, and joint or separate authority. Use questionnaires, personal identification, background checks, suitability screenings, and other tools to ensure you thoroughly understand the matter.

Which Application to File?

Determine whether to file desk or regular applications. Discuss emergencies, situations for 17-year-olds, removal of existing decision-makers, and relevant legislation. Learn the forms and services required for each application, and how to file a new application or an application for review.

Getting to the Finish Line: Pitfalls and Tips

Understand the roles of review officers and clerks. Explore time frames for the various phases of applications, learn strategies to keep your applications from being rejected, and anticipate how to address contested applications.

Setting Up Guardians and Trustees for Success

Analyze the duties of both guardians and trustees. Discuss report letters, record-keeping, accounting, reviews and passing of accounts, guardian and trustee plans, and authority to sell or encumber property.

Strategies for Dealing with the Adult and Asserting the Views of the Adult

Develop a better understanding of the continuum of capacity. Consider tools for assessing the adult and strategies for situations where the adult refuses to participate. Understand issues that can arise when reports are created by a family physician versus an expert. Analyze situations where the adult expresses views to the review officer or disagrees with an application. Discuss what to do when an adult asserts capacity, including conducting a second assessment. Gain tips for managing conflicts between family members respecting the adult's wishes. Explore the best interests of the adult and less-restrictive options.



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REGISTER ONLINE

Reserve your spot in this program.

01 | Visit LESA.org.

02 | Enter code **32111** into the search field.

03 | Add to your cart, **complete** your purchase, and **mark** your calendar.

MORE REGISTRATION OPTIONS

MAIL: 2610 - 10104 103 Avenue Edmonton, Alberta T5J 0H8 | PHONE: 780.420.1987

TOLL FREE IN AB: 1.800.282.3900 | FAX: 780.425.0885



- EDMONTON** February 20, 2019
- CALGARY** February 27, 2019
- EARLY BIRD:** On or before January 8, 2019 \$395 + GST (Lunch is included.)
- REGULAR:** \$445 + GST (Lunch is included.)

LESA offers a range of Access Bursaries on select programs. A limited number of Access Bursaries are available, including bursaries on the basis of financial need. Please contact LESA for details.

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- I live more than 250km (one way) driving distance from nearest program site (50% reduction in fees)
- I am a law student or student-at-law (25% reduction in fees)

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Please do not send credit card information via email. Cheques are payable to the Legal Education Society of Alberta.

GUARANTEE: We take pride in offering high quality programs. If this program does not meet your expectations, please contact us.

CANCELLATIONS: Registration fees, less a **\$50.00** administration fee, will be refunded for cancellations received in writing at least **3** full business days prior to the program. Refunds cannot be given after that date; however, program materials, if any, will be forwarded. Registrant substitution is permitted at all times.

RECORDING: This program may be audio/video recorded and retained by LESA for the purpose of providing legal education.

QUESTIONS? Contact us at info@lesa.org.