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5001 Chowen Avenue So.
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MAGiC
The Minnesota Association for
Guardianship & Conservatorship

thirty-fifth annual

2024 State Conference

Thursday, October 3, 2024

8:00 am – 4:45 pm

Rush Creek Golf Club
7801 County Road 101
Maple Grove, MN 55311

www.minnesotaguardianship.org

Conference Schedule

| | | |
|------------------|---|--|
| 8:00 – 8:25 am | CHECK-IN AND REGISTRATION, TIME WITH VENDORS | |
| 8:25 – 8:30 am | Welcome Remarks, Jeff Schmidt, Conference Committee Chair | |
| 8:30 – 9:30 am | Legislative, Case Law and Policy Update Megan C. Kelly, Attorney and Shareholder, Northwoods Law Group, PA; Jessica Timmington Lindstrom, Attorney and Shareholder, Winthrop & Weinstine, P.A. A review of the new MN statutory language and how this will affect guardians and conservators. | |
| 9:30 – 9:45 am | BREAK AND TIME WITH VENDORS | |
| 9:45 – 10:45 am | Death Is a Collaborative Event Jane Whitloch, End of Life Doula and Co -Founder of Full Circle Care End of life doulas are an important missing piece as we navigate end-of-life decisions. | |
| 10:45 – 11:00 am | BREAK AND TIME WITH VENDORS | |
| 11:00 – 12:00 pm | Star Services – Person Centered Planning <i>(Breakout option)</i> Jennifer Billington, Person-Centered Services Director; Sarah Stein, Educational Services Coordinator The session will focus on the unique balance between assessing and understanding risk for a person, respecting their choice, and keeping that balance. | Special Needs Trust Administration <i>(Breakout option)</i> Katrina Peirce, DHS; Geneva Finn, DHS; Eric Jonsgaard, First Fiduciary Corporation; Jeff Schmidt, Schmitz, Schmidt & Anderson PA This panel will address distributions and accountings for special needs trusts from the perspective of the State DHS, a professional trustee, and an attorney who represents trustees. |
| 12:00 – 12:45 pm | LUNCH | |
| 12:45 – 1:00 pm | Annual Business Meeting, Chaired by Jessica Timmington Lindstrom, President | |
| 1:00 – 2:00 pm | A View from the Bench • Referee Joel Olson, Hennepin County; Referee James Watchke-Koranne, Tenth Judicial District; Referee Tyler Annette, Ninth Judicial District We will get the latest information from the Courts about the administration of Guardianships, Conservatorships and Trusts. | |
| 2:00 – 2:15 pm | BREAK AND TIME WITH VENDORS | |
| 2:15 – 3:15 pm | Culturally Sensitive Health Care Decision-Making <i>(Breakout option)</i> Tuesday Glover This session will address and discuss health disparities among communities of color. | Limiting Guardian Liability with LLC and More <i>(Breakout option)</i> Jacob Woodward, Winthrop & Weinstine P.A.; Samantha Carmickle, Winthrop & Weinstine P.A. Learn how you can protect yourself with business entities from personal liability for your work as a professional fiduciary. |
| 3:15 – 3:30 pm | BREAK | |
| 3:30 – 4:30 pm | Insurance Guidance for Guardians • Carrie Ulberg, MJUA Representative; Dan Haldorson, MJUA Representative; Rick Theisen, MJUA Representative Fiduciary Insurance Updates and Review - A review and update on the MJUA Fiduciary Policy | |
| 4:30 – 4:45 pm | Door Prizes & Farewell, Jeff Schmidt | |

Location

Rush Creek Golf Club
7801 County Road 101 N
Maple Grove, MN 55311

From the North (I-494)
Exit on Bass Lake Road and travel west for approximately 5 miles.

Turn right on County Road 101 and travel north for approximately 1/2 mile.

Rush Creek will be on your left hand side.

From the South (off I-494)
Exit on Highway 55 and head West

Turn Right on County Road 101 heading North

Travel approximately 5 miles and Rush Creek will be on the left-hand side

Hotel options include:

Cambria Suites
9655 Grove Circle North
Maple Grove, MN 55369
Phone: 763.494.5556
Toll Free: 877.424.6423

Courtyard Minneapolis Maple Grove/Arbor Lakes
11871 Fountains Way North
Maple Grove, MN 55369
Phone: 763.425.5355
Toll Free: 888.236.2427



Conference Registration

Also available online at
www.minnesotaguardianship.org

Credit card payment is accepted through online registration.

To register by mail please complete form and return with check to MAGiC, 5001 Chowen Avenue So., Minneapolis, MN 55410

Name _____

Organization _____

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Address _____

City _____

State _____ Zip _____

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Conference Registration Fees

| | Before Sept. 26 | After Sept. 26 |
|--|----------------------------|---------------------------|
| <input type="checkbox"/> MAGiC Member | \$135.00 | \$145.00 |
| <input type="checkbox"/> Non-Member | \$200.00 | \$210.00 |
| <input type="checkbox"/> Non-Member Conference with membership registration | \$270.00 | \$280.00 |
| <input type="checkbox"/> Family Guardians | \$115.00 | \$125.00 |

6 CEU Credits
will be available.

CLE Credits have
been applied for.