

Serving a very diverse population of adults, including but not limited to;

♦
Persons with physical, and/or intellectual disabilities

♦
Persons with severe and persistent mental illness

♦
Persons with degenerative brain disorder

♦
Persons with traumatic brain injury

♦
Spendthrifts

♦
Persons with multiple diagnoses



All guardians and anyone who may be interested are welcome to join the Wisconsin Guardianship Association (WGA).

wisconsinguardianshipassociation.com



Guardians and others interested also have the opportunity to join the National Guardianship Association (NGA) and train to become a Nationally Certified Guardian (NCG)

guardianship.org

Wisconsin
Guardianship
Association

Corporate Guardianship An Introductory Guide

A GUARDIAN IS...

- ♦ Court-appointed and bound by statute
- ♦ An Advocate for the ward
- ♦ A surrogate decision maker
- ♦ A coordinator of services
- ♦ A financial planner

A GUARDIAN IS NOT...

- ♦ A caregiver
- ♦ A companion
- ♦ A warden
- ♦ A reformer
- ♦ A savior
- ♦ A substitute family
- ♦ A transportation service or provider

CORPORATE GUARDIANS

- ◆ Must be Fit and Qualified per statute
 - ◆ DHS Chapter 85 defines Fit & Qualified
- ◆ Corporate Guardian's must complete 20 hours of continuing education every 24 months
- ◆ Must be Bonded and/or Insured
- ◆ Must be State Approved
- ◆ May be conservator and/or administrator of a ward's trust
- ◆ Supersede any previous Power of Attorney
- ◆ Charge a fee which requires court approval

GUARDIAN OF ESTATE

The guardian of estate is required to inventory the wards assets; including all personal property and real estate.

All assets must be used for the wards support, and accounted for by filing detailed annual reports with the court. Court approval must be obtained for certain financial transactions. Other duties performed by the guardian of estate may include but are not limited to:

- ◆ Seek, research, and enroll ward in benefits and services available to them such as disability benefits, Social Security, Medicare, Medicaid, Managed Care Organizations, insurance products, VA benefits, Railroad retirement, annuities and pensions
- ◆ Budgeting Funds (Pay bills, oversee personal spending, set up funeral/burial trust, manage debt, set up special needs trusts when necessary, etc.)
- ◆ Financial planning - Guardian must report to Social Security, Economic Support, VA, MCOs, and have the wards taxes completed annually
- ◆ Marshall and protect assets
- ◆ Obtain appraisals of property
- ◆ Protect property and assets from loss
- ◆ Sale of Assets such as house, car, and other belongings with court approval
- ◆ Must complete a final accounting and distribute funds properly when a ward passes or guardianship ends

Guardians must ensure the maintenance of homes and obtain services for lawn care, snow removal, cleaning, winterizing and many other tasks. In many cases the ward does not have enough funding for the services necessary. The guardian must step in to prevent any loss to assets.

GUARDIAN OF THE PERSON

The guardian of person may have the following responsibilities:

- ◆ Advocate for the ward
- ◆ Determine and monitor residence and care providers
- ◆ Apply for services available to benefit the ward such as DVR counseling, etc.
- ◆ Consent to and monitor medical treatment
- ◆ Consent to and monitor non-medical services such as work, education, day programs, counseling, transportation, Special Olympics, etc.
- ◆ Attend Initial and Major Medical Appointments
- ◆ Attend any consultations for medical procedures and new services
- ◆ Consent to the release of confidential information
- ◆ Consent to social outings and activities
- ◆ Make end-of-life decisions per state statutes
- ◆ Maximize independence in least restrictive manner
- ◆ Coordinate care plans and behavioral plans
- ◆ Attend all meetings such as Annual and 6 month Reviews for the MCO, Staffings, Care Conferences, Long Term Care Functional Screens, and Job or Workshop progress meetings
- ◆ Keep very detailed records for each individual ward
- ◆ Respond to ward phone calls, requests and questions
- ◆ Mediate amongst family and friends of the ward to ensure healthy relations for the ward
- ◆ Referee disputes & help redirect behaviors
- ◆ Problem solve
- ◆ Assist the ward in complying with criminal matters.
- ◆ Advocate for the wards best interest in legal, divorce and child custody and support matters

Guardian's are not direct care providers for the ward, their pets, children, or family members and cannot transport the ward.



AVAILABLE 24 HOURS A

DAY 7 DAYS A WEEK

A guardian must be available at all times to respond to multiple situations such as...

- ◆ Medical Emergencies
- ◆ Weather Related Emergencies
- ◆ Crisis / Emergency Detention
- ◆ Police Interventions
- ◆ Attend decision making meetings
- ◆ Deaths and occasionally births