



8:30 a.m. — 10:00 a.m.  
**Registration and Breakfast**

10:00 a.m. — 10:15 a.m.  
**Welcome and Remarks**

**Hon. Maureen O'Connor**  
Chief Justice, Supreme Court of Ohio

**Hon. Dixilene Park**  
Stark County Probate Court  
Chair, Subcommittee on Adult Guardianship

10:15 a.m. — 11:00 a.m.  
**Keynote Address**

**“Past, Present, and Future of  
Guardianship”**

**Hon. Michael G. Heavican**  
Chief Justice, Supreme Court of Nebraska

**Erica Wood**  
Assistant Director, American Bar Association  
Commission on Law and Aging

11:00 a.m. — 11:15 a.m. — **Break**

11:15 a.m. — 12:15 p.m.  
**Opening Session**  
**“Financial Exploitation and Guardianship”**  
This session will examine warning signs of financial exploitation and provide valuable information on available assistance.

**David Kessler**  
Protecting the Elderly

12:15 p.m. — 1:15 p.m. — **Lunch**  
**State Updates**

- **Christy Tull**, Director, Judicial College, Supreme Court of Ohio
- **Jennifer Justice**, Deputy Director, Ohio Department of Job and Family Services, Office of Families and Children

1:30 p.m. — 2:45 p.m. **Sessions 1 - 4**

[Session 1](#) - BUCKEYE

## **Rights of Individuals with Guardians**

This session will focus on the rights of individuals with guardians and their various sources, as well as how to protect those rights during guardianship.

- **Kristen Henry**, Attorney, Disability Rights Ohio
- **Karla Rinto**, Executive Director, Advocacy & Protective Services, Inc.

[Session 2](#) - THE ALDER

## **Alternatives to Guardianship**

This session will discuss alternatives to guardianship, including: power of attorney, protection orders, civil commitment, advance directives, and conservatorship.

- **Hon. R. R. Denny Clunk (ret.)**, moderator
- **Magistrate Patricia A. Hider**, Butler County Probate Court
- **Sylvia Pla-Raith**, Elder Justice Unit, Ohio Attorney General
- **Paula Taliaferro**, Aging Network, Columbus
- **Magistrate George R. Wertz**, Summit County Probate Court

[Session 3](#) - OAK

## **Interdisciplinary Teams**

The session will briefly explain the concept of Interdisciplinary Teams (I-Teams), and will explore topics in developing a local I-Team, best practices and pitfalls, and I-Team coordination.

- **Hon. Laura J. Gallagher**, Cuyahoga County Probate Court
- **Beverley L. Laubert**, State Long-Term Care Ombudsman
- **Hon. Jan Michael Long**, Pickaway County Probate and Juvenile Court
- **Leslie McGee**, Adult Protective Services, Ohio Department of Job and Family Services
- **Hon. Dixilene Park**, Stark County Probate Court
- **Hon. Thomas A. Swift (ret.)**

# OHIO Guardianship Summit



## [Session 4](#) – THE CEDAR

### [Ethics: I](#)\*

This session will explore various ethical considerations, including: least restrictive alternatives, the court as superior guardian, collaboration with justice system partners, and third-party vendors.

- **Hon. Kathleen L. Giesler**, moderator, Ottawa County Probate and Juvenile Court
- **Allan Asbury**, Supreme Court of Ohio, Board of Professional Conduct
- **Sam Peppers, Esq.**, Dinsmore & Shohl LLP
- **Hon. Kenneth J. Spicer (ret.)**

2:45 p.m. — 3:00 p.m. — **Break**

**3:00 p.m. — 4:15 p.m. Sessions 5 - 8**

## [Session 5](#) - OAK

### **Innovative Funding and Monitoring**

This session will focus on leading-edge strategies for funding and monitoring of adult guardianship programs, and will explore local collaborative programs.

- **Hon. Charlotte Coleman Eufinger**, moderator, Union County Probate and Juvenile Court
- **Cindy Farson**, Central Ohio Area Agency on Aging
- **Hon. Robert G. Montgomery**, Franklin County Probate Court
- **Hon. Dixilene Park**, Stark County Probate Court

## [Session 6](#) – THE ALDER

### **Exploring Sup.R. 66.01-.09**

This session will discuss common questions that have arisen as a result of the implementation of Sup.R. 66.01-.09, including the complaint process, reporting allegations of abuse to the court, guardianship record sealing, and the use of court investigators.

- **Derek Graham, Esq.**, Onda, LaBuhn, Rankin & Boggs Co. LPA
- **Hon. Jan Michael Long**, Pickaway County Probate and Juvenile Court
- **Hon. Philip Alan B. Mayer**, Richland County Probate Court
- **Magistrate Nancy Miller**, Lucas County Probate Court
- **Magistrate Benjamin Suffron**, Franklin County Probate Court

## [Session 7](#) - BUCKEYE

### **Putting it All Together**

This session provides participants with an opportunity to examine a series of case studies involving various adult guardianship issues which may impact multiple professional disciplines.

- **Julia Nack**, Central Ohio Area Agency on Aging

## [Session 8](#) – THE CEDAR

### [Ethics: II](#)\*

This session will explore various ethical considerations, including: power of attorney, criminal implications, family conflict, billing, and guardian education on available services.

- **Hon. Kathleen L. Giesler**, moderator, Ottawa County Probate and Juvenile Court
- **Allan Asbury**, Supreme Court of Ohio, Board of Professional Conduct
- **Sam Peppers, Esq.**, Dinsmore & Shohl LLP
- **Terry Russell**, National Alliance on Mental Illness Ohio
- **Hon. Kenneth J. Spicer (ret.)**

**4:15 p.m. — 5:00 p.m.  
Team Collaboration with Facilitator**

## [Resources](#)

**\*These panels are independent of one another and will cover different topics. You do not need to attend Ethics I in order to attend Ethics II.**