

AFA 2019 Spring Conference Agenda " A Fiduciary's Journey and Commitment to Excellence"

THURSDAY MAY 2, 2019

All Bios and Presentation Materials Available on the AFA Dropbox

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WiFi Password: AFA19

TIME	CEU'S	DESCRIPTION	CONTENT & PRESENTERS	ETHICS OPP	LOCATION				
7:00a-7:45a	--	Registration and Breakfast			Agave Desk/Turquoise Foyer				
7:45a-8:00a	--	Introduction	Jeanette Bloss, AFA President		Turquoise II, III				
8:00a-9:15a	1.25	<i>The Past and Present of the Arizona Licensed Fiduciary</i> (Keynote 1)	John Barron, III, Esq.		Turquoise II, III				
9:15a –10:00a	--	Membership Meeting, Vendor Introductions, Voting for New Board Member	AFA Board of Directors		Turquoise II, III				
10:00a-10:15a	--	Break							
10:15a-11:45a	1.50	<i>Legislation Review and Probate Task Force Update</i>	Denice Shepherd, Esq., & Lisa Price		Turquoise II, III				
11:45a-12:45p		Lunch			Turquoise Foyer				
12:45p-2:00p	1.25	<table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 50%; text-align: center;">Breakout Track 1 -</td> <td style="width: 50%; text-align: center;">Breakout Track 2 -</td> </tr> <tr> <td style="text-align: center;"><i>Did You Know???</i> <i>Behind the Scenes of the Referral and Placement Industry</i> Scott Fischer, BSN</td> <td style="text-align: center;"><i>Effective Communication in Difficult Conversations</i> Kristine Reich, Esq. and MSW</td> </tr> </table>	Breakout Track 1 -	Breakout Track 2 -	<i>Did You Know???</i> <i>Behind the Scenes of the Referral and Placement Industry</i> Scott Fischer, BSN	<i>Effective Communication in Difficult Conversations</i> Kristine Reich, Esq. and MSW			Turquoise II, III
Breakout Track 1 -	Breakout Track 2 -								
<i>Did You Know???</i> <i>Behind the Scenes of the Referral and Placement Industry</i> Scott Fischer, BSN	<i>Effective Communication in Difficult Conversations</i> Kristine Reich, Esq. and MSW								
2:00p-2:15p	--	Break							
2:15p-3:30p	1.25	<table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 50%; text-align: center;">Breakout Track 1 -</td> <td style="width: 50%; text-align: center;">Breakout Track 2 -</td> </tr> <tr> <td style="text-align: center;"><i>Understanding Long Term Care Insurance: Maximizing Benefits and Minimizing Costs</i> Dan Fern</td> <td style="text-align: center;"><i>Preparing for Litigation</i> J. Emery Barker, Esq.</td> </tr> </table>	Breakout Track 1 -	Breakout Track 2 -	<i>Understanding Long Term Care Insurance: Maximizing Benefits and Minimizing Costs</i> Dan Fern	<i>Preparing for Litigation</i> J. Emery Barker, Esq.			Turquoise II, III
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<i>Understanding Long Term Care Insurance: Maximizing Benefits and Minimizing Costs</i> Dan Fern	<i>Preparing for Litigation</i> J. Emery Barker, Esq.								
3:30p-3:45p	--	Break - Snack			Turquoise Foyer				
3:45p-5:00p	1.25	<i>Being Audit Ready - Best Practices</i>	Roger Coventry	1.25	Turquoise II				
5:30p-7:30p	--	Reception	<i>Sponsored by ... Bond Services of AZ and Arizona Bank & Trust</i>		Last Territory & Courtyard				
Total CEUs		6.50		Total Ethics Available					
				1.25					

Agenda Subject to Change

AFA 2019 Spring Conference Agenda
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FRIDAY, MAY 3, 2019

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TIME	CEU'S	DESCRIPTION	CONTENT & PRESENTERS	ETHICS	
				OPP	LOCATION
7:00a-8:00a	--	Registration and Breakfast			Agave Desk/Turquoise Foyer
8:00a-9:30a	1.50	<i>The Future of the Arizona Licensed Fiduciary</i> (Keynote 2)	Elizabeth Friman, Esq.		Turquoise II
9:30a-9:45a	--	Break			
9:45a - 10:45a		Breakout Track 1 -	Breakout Track 2 -		
Turquoise I	1.00	<i>Special Needs Trusts: Disbursements and Updates</i> Victoria Blair Struse, Esq. & Emily Kile, Esq.	<i>Standards of Practice for Probate Real Estate: Reducing Liability</i> Chris Carter Kent, Jennifer Runyon, Hon. Stephen Kupiszewski		Turquoise II, III
10:45a-11:00a	--	Break			
11:00a-12:15p		Breakout Track 1 -	Breakout Track 2 -		
Turquoise I	1.25	<i>Public Fiduciaries: Enhancing Referral Management Outcomes and Results</i> Rashida Suminski, Peter Santini, Kathryn Blair, Amanda Ubiebor	<i>Conflict of Interest - Real and Perceived: A Round Table Discussion</i> Jeanette Bloss and Jacque Mingle, Esq.		Turquoise II, III
12:15-1:15p	--	Lunch			Turquoise II, III
12:45-1:15p	--	Awards/Raffles (TBD)	Stephanie McCollum, Lori Lashley		Turquoise II, III
1:15p-1:30p	--	Break			
1:30p-2:45p	1.25	<i>"When I Need Help, I'll Ask For It:" Options For Protecting Vulnerable Adults</i>	Jennifer Kupiszewski, Esq.	1.25	Turquoise II, III
2:45p-3:00p	--	Break - Snack			Turquoise Foyer
3:00p-4:15p	1.25	<i>The AOC Complaint and Investigation Process</i>	Stacey Johnson, Esq., Gary Strickland, Esq.; Teresa Lancaster, Esq., Lisa Price, Larry Scaringelli, Esq., Stephanie McCollum	1.25	Turquoise II, III
Total CEUs		6.25	Total Ethics Available		2.50

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