

New Rules for Guardianships and the Guardianship Tracking System

Presenters: Latisha Bernard Schuenemann, Esq, shareholder at Leisawitz Heller

Latisha's practice focuses on a wide variety of estate and trust law topics, including estate planning, estate administration, special needs planning, and fiduciary litigation. She routinely handles guardianship cases throughout eastern Pennsylvania. She also works extensively with families and corporate fiduciaries to establish first party special needs trusts and third party supplemental needs trusts.

Pamela W. Blumer, professional fiduciary in private practice.

Pam has been acting as a court-appointed guardian and agent under power of attorney for clients in Berks County since 2010. In her work she actively manages the financial and medical decision making for between 25 and 30 individuals coping with dementia, mental illness and developmental disabilities.

Matthew Fessler, Esq., Judicial Clerk for the Honorable James Bucci, Berks County Court of Common Pleas.

As one of the law clerks working on guardianship and other Orphans' Court cases, Matt assists with the court's oversight of the guardianship cases in Berks County. Matt will speak on the court's use of the GTS and how the new rules for guardianship hearing will likely impact the work of the court.

Moderator: William R. Blumer, Esq., CELA

Bill is a shareholder at Leisawitz Heller focusing his practice on the areas of estate planning and administration, elder law and fiduciary litigation. He is one of only two certified elder law attorneys practicing in Berks County.

Our written materials will consist of a copy of the Guardianship Tracking System Reference Guide. This will be a panel discussion dealing with how the GTS system works and common issues practitioners and their clients are facing when using the system. Latisha Schuenemann will also be providing an overview of the changes to the guardianship statute that will go into effect on June 1, 2019, paying particular attention to new information that must be included when guardianship petitions are filed with the court.

If possible, we will be doing a live demonstration of the GTS system to show the audience how the system works. For this we'll need a projector we can hook up to an Apple laptop along with Wi-Fi

access. I expect all presenters will be at a table at the front of the room and will need a few table microphones to use. No wireless or handheld mics should be needed.