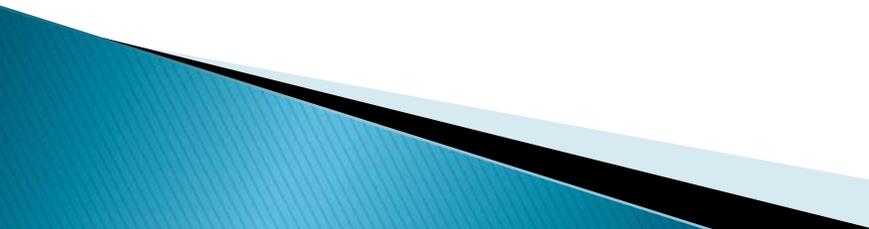


OFFICE OF PUBLIC FIDUCIARY Restructuring

Joan Sacramento M.S.W., J.D., Director

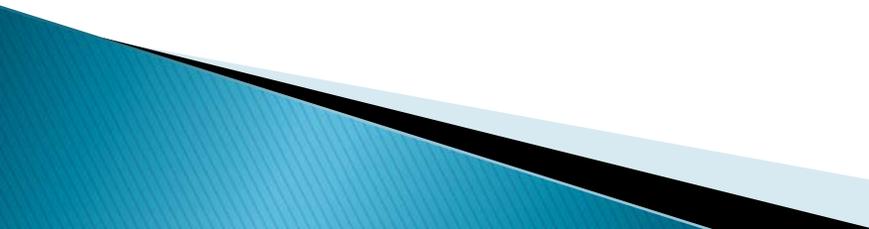
PROTECTION OF VULNERABLE ADULTS AND THEIR ESTATES

- ▶ Public Fiduciary is created by the legislature
 - ▶ Established to handle the affairs of vulnerable adults and estates of decedents when no one else is available
 - ▶ Responsible for Indigent Burial
- 

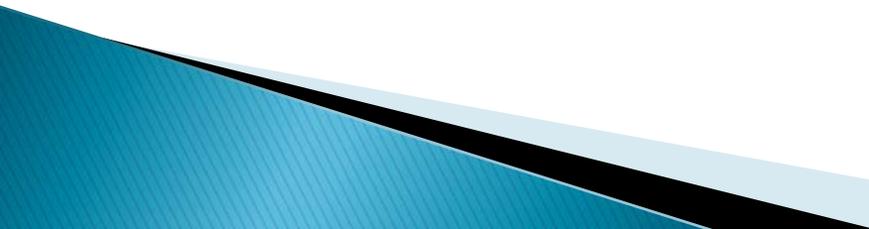
SERVICE AREAS

- ▶ Guardianships – Decisions for person and small estates – under \$10,000.00
 - ▶ Conservatorships – Decisions for assets of the person
 - ▶ Decedent Estates – Decisions to conclude the affairs of the deceased
 - ▶ Fees are charged for the services provided
- 

INTAKE CASE MANAGER

- ▶ Referrals are made by different agencies and the Superior Court when there is a concern regarding a vulnerable adult
 - ▶ Preliminary information is gathered regarding the needs of the person
 - ▶ An investigation is initiated regarding whether the person is incapacitated and has no other option than a guardianship and/or conservatorship
 - ▶ Determines whether the Public Fiduciary is the last resort
- 

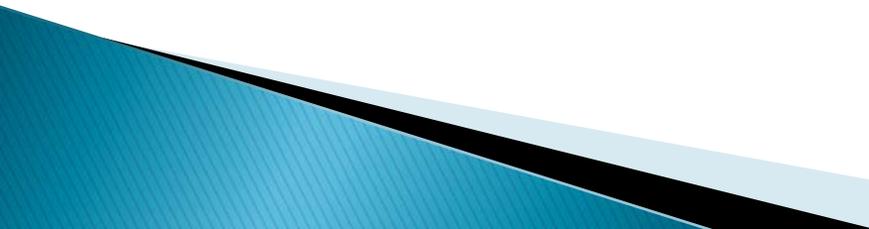
COURT PROCESS

- ▶ Person is determined by the investigation to be incapacitated and appropriate for services through the County
 - ▶ Public Fiduciary files a petition for appointment of guardianship and/or conservatorship (if person has assets over \$10,000.00)
 - ▶ The person is assigned an attorney to represent them
 - ▶ Court Visitor is assigned the case to give a report to the Court
 - ▶ Alleged incapacitated person has a right to an evidentiary hearing
 - ▶ Intake Case Manager may testify as to incapacity
- 

DUTIES UPON APPOINTMENT AS GUARDIAN AND CONSERVATOR

- ✓ Conducts an inventory within 90 days to be filed with the Court
 - ✓ Gets appraisals for valuable assets, such as residence
 - ✓ Works with Real Estate Agents for sale of property
 - ✓ Changes locks on the residence
 - ✓ Reviews important personal papers for financial investments and legal documents
 - ✓ Collects money from banks to be placed with Pinal County Treasurer in a client account
 - ✓ Establishes a budget and pays bills
 - ✓ Provides transportation to appointments if necessary
 - ✓ Contacts service agencies of appointment and signs authorizations
- 

DUTIES, continued

- ✓ Makes decisions for medical treatment
 - ✓ Makes decisions for placement
 - ✓ Handles any legal matters that may be pending
 - ✓ Reviews benefits for appropriateness
 - ✓ Disposes of personal and real property
 - ✓ Preserves the estate for the protected person
 - ✓ Maintains contact with interested parties
 - ✓ Visits client at placement
 - ✓ Reviews client's needs with staff
 - ✓ Documents all actions in data base
- 

ON-GOING CASE MANAGER RESPONSIBILITIES

- ▶ Reviews case plan with Intake Case Manager
- ▶ Goes with Intake Case Manager when dual custody is required
- ▶ Establishes a relationship with ward
- ▶ Ensures all medical and placement needs are met
- ▶ Provides transportation to medical appointments if needed
- ▶ Visits with person a minimum of 4 times per year
- ▶ Maintains contact with care givers
- ▶ Establishes a yearly budget and pays bills
- ▶ On-going assessment of services provided to ward for adequacy and appropriateness
- ▶ Prepares annual guardianship report
- ▶ Documents all actions in data base

GENERAL INFORMATION

- Case Manager Average Case Load: 50+
- Clients served FY 2012/2013: 275
Past Month: 202
- Charges for Services:
 - Director/Attorney: \$100.00 per hour
 - Case Managers/Legal Secretary: \$40.00 per hour
 - Finance/Benefits/Bill Pay: \$40.00 per hour
- Client money with County Treasurer:
\$425,867.00
- Fees Collected FY 2012/2014:
\$89,829.00

THE END

