

MEETING NOTES

Guardianship Committee– Task Force on Preventing and Countering Elder Abuse

February 5, 2024

This meeting was held via video conference.

Members in Attendance:

Magistrate Sara D. Walsh, Chair

Steve Kensinger

James Silver, Esq.

Leonard Croft

Zoe Breichner, Esq.

Greg Seseck

WELCOME AND INTRODUCTION

Magistrate Sara Walsh, chair, welcomed all and opened the meeting.

REVIEW OF MEETING NOTES

The members reviewed the minutes from the January 30, 2024 meeting. The minutes were amended to cite the three previously identified potential objectives of the committee and reflect the committee's decision against exploring inconsistent policies between jurisdictions within the report.

TANGIBLES

The 1986 preliminary model report was distributed to members for review.

UPCOMING DEADLINES

Each committee must identify its respective subtopics by February 15, 2024, with a preliminary draft of each report to be submitted to the chair of the task force by March 15, 2024. A final preliminary report is due to the governor's office on April 15, 2024.

REVIEW OF OBJECTIVES

The members discussed each of the remaining objectives and identified areas of focus within each topic to expound on within the report. The members proposed highlighting additional noteworthy areas of concern outside of the previously identified topics, pending the identification of each committee's subtopics:

- 1) A lack of skilled and experienced guardians of the property willing to serve and the resulting crisis.
 - a. Funding
 - b. Training for skilled MA attorneys
- 2) Issues that arise between guardians and banking institutions.
 - a. Poll banks to identify major concerns
 - b. Determine how to mitigate risk for compliance
 - c. Guidance documents for financial institutions
- 3) Oversight of public and private guardianships
 - a. Review board for private guardianships
 - b. Citizens review board may present a model to encompass all guardianships
- 4) Hospital to guardianship pipeline
 - a. Facilitating discharge
 - b. Locating interested persons
 - c. Addressing housing gaps

NEXT MEETING

The next meeting date will be determined following the chair meeting. A poll will be emailed with potential dates. Topics will be assigned to members at the next meeting.

ADJOURNMENT

Magistrate Sara D. Walsh adjourned the meeting.