

March 14, 2013

House Committee on Human Services and Housing

RE: HB3129

First Hearing, HR D

Personal Testimony

Chair and members of the committee. Thank you for the opportunity to testify before you in support of HB 3129 and the proposed amendment as requested. I am Michael O'Shea, owner and president of Tiffany and O'Shea, Inc. I have been a professional fiduciary for 14 years. I recently was the president of the board of the Guardian and Conservator Association of Oregon. I also have been the recipient of the affiliate of the year, awarded by the National Guardian Association. Tiffany and O'Shea 's staff of ten provides guardian, conservator, case management, trust and personal representative services to approximately 170 clients.

The work we do is demanding. We often pick up the pieces of people's lives when dementia or mental illnesses have wreaked havoc on them and their assets. We are called upon to manage all aspects of a person's life. I often say that even after 14 years there is not a day that goes by that I don't learn something new.

Imagine, if you will, managing everything about a person's world. From medical decisions to real estate, funeral planning to divorce, from running LLC's to evictions, from charging people for elder financial abuse to holding the hand of our client as they pass. We do it all.

I'm unaware of any certain degree that can train people for the incredible spectrum of issues that will arise after a judge signs the order appointing you guardian and / or conservator. In my office, I have staff with varied backgrounds; social workers, a computer programmer, valedictorian in psychology, air force veteran and an attorney, to name a few. All these disciplines help us provide excellent service to our clients as we all bring different perspectives to the table.

However, the Guardian Conservator Association of Oregon in conjunction with the Center for Guardian Certification and the National Guardian Association provide invaluable training and support. Ten years ago I traveled to Cleveland in order to train and test for my Nationally Registered Guardian Certification. That training is fundamental to me doing good work. That certification coupled with the Oregon Certified Professional Fiduciary training and certifications have been invaluable. As such, all my staff that work directly with clients or their assets are either certified or working towards their certification. I also want to mention that the GCA of Oregon has provided many trainings and conferences that have enriched my work. Furthermore, knowing that I can pick up the phone and reach out to any of the members of the GCA to discuss difficult matters has been a blessing.

Due to these reasons I strongly encourage the committee to adopt the amendment so that all professional fiduciaries in Oregon are required to obtain certification through the Center for Guardian Certification in conjunction with the Guardian Conservator Association of Oregon. And by doing so are able to best serve our fellow Oregonians that find themselves in such terrible situations. Thank you.