



## **Background**

The Center for Guardianship Certification (CGC) was created in 1994 as an allied organization of the National Guardianship Association (NGA) to enhance the quality of guardianship services through national certification. CGC views certification not as the end, but as a means to demonstrate to the public, clients, and the courts that the certified guardian has sufficient skill, knowledge and understanding of the universal guardianship principles to be worthy of the responsibility entrusted to him or her.

Certification entitles the guardian to represent to the courts and the public that he or she is eligible to be appointed, is not disqualified by prior conduct, agrees to abide by universal ethical standards governing a person with fiduciary responsibilities, submits to a disciplinary process, and can demonstrate through a written test an understanding of basic guardianship principles and laws.

## **Vision Statement**

Every guardian will obtain and maintain CGC certification.

## **Mission Statement**

The mission of the Center for Guardianship Certification is to provide a comprehensive guardian certification program.

## **Purpose**

The purpose of the Center for Guardianship Certification is:

- A. To develop and administer a national credentialing process for guardians.
- B. To address issues related to renewal, suspension and revocation of credentials for guardians.
- C. To encourage, support and foster best practices in the provision of quality guardianship services.

## 2019 CGC Board of Trustees

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## Certified Guardians 3-Year Statistical Overview

	<u>2017</u>	<u>2018</u>	<u>2019</u>
<b>National Certified Guardians</b>			
Applications Received	96	138	162
Retests Administered *	108	109	76
Certification Renewals	487	471	423
NCGs at end of fiscal year	1,301	1,259	1,286
NCGs at end of fiscal year for Emeritus Status	14	15	15
NCGs at end of fiscal year for Inactive Status	16	17	17
NCG percentage rate for recertification	75%	83%	81%
<b>National Master Guardians</b>			
Applications Received	3	4	7
Retests Administered	1	0	0
Certification Renewals	19	23	11
NMGs at end of fiscal year	57	54	56
NMGs at end of fiscal year for Emeritus Status	8	8	7
NMGs at end of fiscal year for Inactive Status	1	1	1
NMG percentage rate for recertification	82%	95%	86%
<b>State-Specific Certification</b>			
California Applicants	81	125	97

\* Inclusive of NCG exams and state-specific exams

## Certified Guardian Complaints

### **8 complaints were filed against certified guardians in 2018**

- 2 complainants did not follow-up with required documentation
- 3 complaints were dismissed as no prohibited conduct was found
- 2 complaints resulted in a revocation
- 1 complaint resulted in a censure

### **8 complaints were filed against certified guardians in 2018**

- 3 complaints were dismissed as no prohibited conduct was found
- 1 complaint was deferred to an appropriate court of law
- 1 complaint resulted in a revocation
- 3 complainants did not follow-up with required documentation

### **8 complaints were filed against certified guardians in 2017**

- 1 complaint was deferred to the appropriate court of law
- 1 complaint resulted in a suspension
- 2 complainants did not follow-up with required documentation
- 4 complaints resulted in an interim suspension

### **8 complaints were filed against certified guardians in 2016**

- 1 complaint was deferred to the appropriate court of law
- 1 complaint resulted in a suspension
- 1 complaint resulted in a revocation
- 1 complainant did not follow-up with required documentation
- 4 complaints resulted in censure

## Financial Statements

January through December 2019 Financial Statement

	<u>Dec 31, 19</u>
<b>ASSETS</b>	
<b>Current Assets</b>	
<b>Checking/Savings</b>	
1000 · BB&T Checking	90,159.56
1003 · Money Market BB&T	<u>72,324.61</u>
<b>Total Checking/Savings</b>	162,484.17
<b>Other Current Assets</b>	
1004 · M1 CD 8/7/21	<u>76,627.39</u>
<b>Total Other Current Assets</b>	<u>76,627.39</u>
<b>Total Current Assets</b>	<u>239,111.56</u>
<b>TOTAL ASSETS</b>	<u><b>239,111.56</b></u>
<b>LIABILITIES &amp; EQUITY</b>	
<b>Liabilities</b>	
<b>Current Liabilities</b>	
<b>Other Current Liabilities</b>	
2401 · Illinois Unearned Income	<u>1,450.00</u>
<b>Total Other Current Liabilities</b>	<u>1,450.00</u>
<b>Total Current Liabilities</b>	<u>1,450.00</u>
<b>Total Liabilities</b>	1,450.00
<b>Equity</b>	
3001 · Temp Restr Fund NMG Star	288.68
3002 · Temp Restr Fund NCG Award	386.36
3900 · Fund Balance	203,167.35
Net Income	<u>33,819.17</u>
<b>Total Equity</b>	<u>237,661.56</u>
<b>TOTAL LIABILITIES &amp; EQUITY</b>	<u><b>239,111.56</b></u>

## CENTER FOR GUARDIANSHIP CERTIFICATION – 2019 ANNUAL REPORT

### January through December Financial Statements – 3-year Comparison

<b>Account</b>	<b>Actual 2017</b>	<b>Actual 2018</b>	<b>Actual 2019</b>
<b>INCOME</b>			
Certification Renewals	\$90,312.50	101200.00	97950.00
Certification Applicants	61,805.00	88260.00	103150.00
Certification Retests	29,525.00	30530.00	43512.50
Investment Income	469.41	294.40	1648.75
Other Income	260.00	1205.00	410.00
<b>TOTALS</b>	<b>182,371.91</b>	<b>221,489.40</b>	<b>246,671.25</b>
<b>EXPENSES</b>			
Award & Scholarship Expense	\$445.25	355.37	583.54
Bank Fees	146.52	98.00	90.00
Board Expense	2,397.38	2731.43	2014.38
Committee Expense	5,859.63	4796.02	5598.54
Copying Costs	1,691.34	1155.39	1615.11
Credit Card Fees	5,784.68	7335.83	8300.59
Data Security & Storage	0.00	360.00	360.00
Dues & Contributions	522.67	323.60	694.39
Insurance & Taxes Expense	6,147.00	6202.00	6223.00
Exhibitor Costs	0.00	0.00	629.87
Management Services	113,300.04	117900.00	119900.00
Office Expense	613.59	1151.95	600.00
Postage, Shipping & Mailing	1,977.45	1565.67	1859.81
Printing	172.25	477.00	0.00
Professional Fees	13,284.92	14460.00	24585.54
Travel	2,819.76	5423.45	6834.18
Telephone & Fax	2,207.26	1760.87	2385.40
Testing Site Expenses	11,547.50	15274.50	22190.00
Volunteer Support Expenses	9,456.34	6406.10	6417.74
Website & Internet Fees	8,397.70	7707.47	1969.74
<b>TOTAL</b>	<b>\$186,861.28</b>	<b>196062.65</b>	<b>212852.08</b>
<b>NET INCOME/(EXPENSE)</b>	<b>(\$4,489.37)</b>	<b>25,426.75</b>	<b>33819.17</b>