

LISA M. PRICE, LICENSED FIDUCIARY, NATIONAL MASTER GUARDIAN

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EMPLOYMENT

ENTRUST FIDUCIARY SERVICES, INC.

YEARS EMPLOYED JUNE 2004 – CURRENT

PRINCIPLE LICENSED FIDUCIARY/OWNER

YUMA AND PHOENIX, ARIZONA

- Responsible for the supervision and oversight of all staff, contract employees and service providers as required by the Arizona Code of Judicial Administration §7-202(J)
- Draft, review and edit all necessary pleadings relative to the appointment of guardian, conservator, personal representative, trustee or successor trustee, inventory and appraisements and annual accountings
- Research and analyze legal sources such as statutes, case law and opinions
- Attend and participate in hearings; Provide testimony as necessary
- Generate correspondence to wards, families and local attorneys
- Participate in state required care plan conferences at skilled nursing facilities
- Make pertinent medical decisions for all clients
- Perform property management duties including liquidation of personal and real property
- Participate and assist in investigations conducted by the Arizona Department of Economic Security, Adult Protective Services Division
- Participate and assist in investigations conducted by local, state and federal law enforcement agencies relative to the physical abuse and/or financial exploitation of vulnerable or incapacitated adults
- Coordinate, collect and prepare evidence, affidavits and other documents for use in legal proceedings
- Prepare applications for Medicaid services through the Arizona Health Care Cost Containment System
- Attend determination and annual re-determination hearings for Medicaid services
- Perform accounts payable/accounts receivable responsibilities for clients and corporation
- Provide testimony as an expert witness in cases involving a breach of fiduciary duty
- Maintain licensure as required by the Arizona Supreme Court

ARIZONA FIDUCIARIES ASSOCIATION, INC.

YEARS VOLUNTEERING 2005 – 2012

BOARD OF DIRECTORS; INTERIM EXECUTIVE DIRECTOR (2012 – 2013)

- Served as Secretary of the Board in 2006
- Served as Vice-President of the Board in 2007
- Served as President of the Board from 2008 - 2010
- Served as Executive Director of Association from 2012 - 2013
- Drafted the Request for Proposals for the implementation of AFA website; Served as the Chair of the Website Development Committee
- Drafted the Request for Proposal for the engagement of an Executive Director in both 2006 and 2013; worked directly with new Executive Director to ensure continued operation of non-profit corporation
- Directly involved in the planning and coordination of annual AFA Spring two-day educational conference and the AFA Summer workshop (2006 – 2012)
- Manage all aspects of planning, contract negotiations, vendor/sponsorship solicitation and faculty coordination for 2013 AFA Spring educational conference; Prepare all conference materials
- Served as conference faculty at AFA educational conferences and workshops
- Served as Chair of the AFA Policy Guide Committee; Developed and released state-wide policy guide for licensed fiduciaries in order to ensure compliance with all applicable statutes, rules and administrative code provisions

- Served as the regulatory liaison for the Board by attending and providing testimony to the Arizona Supreme Court Fiduciary Licensing Board and the Arizona Judicial Council regarding proposed administrative code rule change petitions
- Attend meetings of the Committee on Improving Judicial Oversight and Processing of Probate Court Matters and Workgroups; Provide public testimony on behalf of the Board and the AFA membership
- Worked closely with the legislatures and stakeholders on the drafting and passage of House Bill 2616 (Jesse's Law)
- Registered lobbyist for the AFA during the 2011 legislative session; worked closely with the legislature and stakeholders on the drafting and passage of House Bill 2424 and Senate Bill 1499
- Provide public testimony to the Senate Appropriations Committee regarding the passage and implementation of House Bill 2424 and Senate Bill 1499

OFFICE OF COURT ADMINISTRATION – TASK FORCE ON INDIGENT DEFENSE

YEARS EMPLOYED NOVEMBER 2003 – MAY 2004

PROGRAM MONITOR

AUSTIN, TEXAS

- Monitor financial compliance by counties within the terms and conditions of \$28 million in biennial grants
- Ensure grant expenditures are in compliance with the Uniform Grant Management Standards (UGMS)
- Monitor programmatic compliance with the newly passed Texas Fair Defense Act
- Conduct interviews with various county officials, including county auditors, statutory county judges, county court at law judges, district court judges and law enforcement personnel
- Prepare detailed monitoring review reports
- Report status of monitoring reviews to Task Force members and committee members, which include State Senators and Representatives, Presiding Justice of the Texas Criminal Court of Appeals, County Commissioners and the Defense bar
- Implement policies and procedures for the daily operation of the program
- Perform a risk assessment review of all 254 counties to determine monitoring priorities
- Perform desk review of all 254 county annual expenditure reports

TEXAS CONFERENCE OF URBAN COUNTIES

YEARS EMPLOYED JULY 2002 – OCTOBER 2003

PROGRAM MANAGER – COMMON INTEGRATED JUSTICE SYSTEM PROJECT

AUSTIN, TEXAS

- Supervise part-time interns from the University of Texas
- Coordinate the Request for Proposal process for the procurement of a Common Integrated Justice System
- Oversee meetings of the Program Enterprise Management Office and the Board of Directors which consists of a member of each of the 13 participating Texas counties
- Oversee meetings of the Project Technical Committee
- Preparation of the project budget
- Preparation of a grant application through the United States Department of Commerce, Technology Opportunities Program
- Monitor and report the status of similar efforts being conducted by other counties, cities, states and the federal government, specifically efforts being undertaken by the United States Department of Justice, Office of Justice Programs XML Standards Initiative
- Report status of the program to various local and state law enforcement officials through conferences sponsored by the Texas Criminal Justice User's Information Group

PUBLIC POWER POOL / ASSOCIATION POWER, LLC

YEARS EMPLOYED JULY 2002 – OCTOBER 2003

PROGRAM MANAGER – ELECTRIC AGGREGATION PROGRAM

AUSTIN, TEXAS

- Supervise program administrator and part-time interns from the University of Texas
- Coordinate the Request for Proposal process and contract negotiations for the procurement of a \$350 million, 2-year electric contract in the Texas deregulated electric market
- Ensure compliance of a \$350 million contract awarded to Retail Electric Providers
- Manage the daily issues of 7,000 electric accounts statewide
- Assist County Auditors in the review and reconciliation of hundreds of electric bills
- Provide statistical updates to members regarding the status of the contract, including analysis of natural gas rates, peak usage and budget forecasts
- Monitor regulatory issues at the Texas Public Utility Commission and update members as appropriate
- Coordinate all membership issues for 150 members including counties, cities, municipalities, independent school districts, local hospital districts and non-profit organizations
- Maintain daily contact with members, Board of Directors and other professionals
- Implement policies and procedures for the daily operations of the program
- Coordinate marketing efforts to ensure continued growth of both programs
- Participate and coordinate training efforts for member organizations and various city, county and municipal employees

THE LIVER FOUNDATION OF CENTRAL TEXAS, INC.

YEARS EMPLOYED NOVEMBER 2001 – SEPTEMBER 2002

ACTING EXECUTIVE DIRECTOR; SECRETARY/TREASURER

AUSTIN, TEXAS

- Prepare all necessary documents to incorporate a Texas Non-Profit Corporation
- Prepare all necessary documents to obtain tax-exempt status from the Internal Revenue Service
- Work with the Board of Directors to initiate and implement a strategic plan
- Implement Foundation policies and procedures
- Implement patient qualifications and protocol
- Implement physician treatment protocol and education program
- Manage all phases of day-to-day operations of the Foundation
- Serve as Foundation liaison and coordinator with various professional consultants including attorneys and accountants
- Promote the Foundation to other organizations
- Serve as centralized spokesperson for the Foundation
- Reply to all information requests regarding Foundation activities and objectives
- Prepare and present monthly financial reports
- Maintain all bookkeeping records including processing of all accounts payable and receivable
- Oversee and coordinate all fundraising activities for the Foundation

CANTEY & HANGER ROAN & AUTREY, L.L.P.

YEARS EMPLOYED JUNE 2000- JUNE 2002

Certified Legal Assistant

Austin, Texas

- Prepare, review and edit various estate planning documents, including wills, trusts and all ancillary documents
- Prepare various tax materials including estate tax returns, individual tax returns and corporate tax returns
- Prepare necessary documents for the organization of Corporations, Non-Profit Corporations, Limited Partnerships and Limited Liability Companies including Articles of Incorporation, By-laws and board resolutions
- Prepare necessary documents for the organization and licensing of insurance companies and

- insurance agencies
- Research and analyze legal sources such as statutes, case law and opinions
- Assist in all phases of trial preparation including setting hearings and coordinating calendars
- Draft correspondence to clients and other professionals
- Maintain calendar and filing system for four attorneys

WESTERN ARIZONA FIDUCIARY SERVICES, INC.

YEARS EMPLOYED JUNE 1997 to JUNE 2000

Certified Private Fiduciary/Assistant Fiduciary

Yuma, Arizona

- Supervise five employees
- Prepare, review and edit all necessary pleadings relative to the appointment of guardian, conservator, personal representative, trustee or successor trustee, inventory and appraisements and annual accountings
- Research and analyze legal sources such as statutes, case law and opinions
- Attend and participate in hearings
- Generate correspondence to wards, families and local attorneys
- Participate in state required care plan conferences at skilled nursing facilities
- Make pertinent medical decisions for clients in the absence of guardian through authority granted in a Special Power of Attorney
- Supervise property management duties including liquidation of personal and real property
- Participate and assist in investigations conducted by the Arizona Department of Economic Security, Adult Protective Services Division
- Participate and assist in investigations conducted by local, state and federal law enforcement agencies relative to the physical abuse and/or financial exploitation of vulnerable or incapacitated adults
- Participate in coordinating, collecting and preparing evidence, affidavits and other documents for use in legal proceedings
- Prepare applications for Medicaid services through the Arizona Health Care Cost Containment System
- Attend determination and annual redetermination hearings for Medicaid services
- Assist in accounts payable/accounts receivable responsibilities
- Maintain certification as required by the Arizona Supreme Court

EDUCATION/LICENSURE

NORTHERN ARIZONA UNIVERSITY

Bachelor of Science in Criminal Justice; Minor - Sociology

Graduated August 2000

ARIZONA SUPERME COURT, FIDUCIARY LICENSING PROGRAM

Original License 1999; Re-licensed on August 24, 2004

CENTER FOR GUARDIANSHIP CERTIFICATION

National Certified Guardian, August 2007

CENTER FOR GUARDIANSHIP CERTIFICATION

National Master Guardian, December 2011

MEMBERSHIPS

- Arizona Fiduciaries Association, Inc.
- National Guardianship Association
- Better Business Bureau
- Yuma County Elder Abuse Task Force
- Western Arizona Council of Governments Networking Group
- Arizona Statewide Elder Abuse Coalition

BOARD OF DIRECTORS/COMMITTEES

- Arizona Fiduciaries Association, Inc. – Interim Executive Director – 2012 – 2013
- Arizona Fiduciaries Association – 2005 to 2012
President – 2008-2010, Vice-President – 2007, Secretary – 2000
- National Guardianship Association – 2011
- National Guardianship Association Marketing Committee Chair – 2011
- Arizona Supreme Court Fiduciary Licensing Program Regulatory Sub-Committee – 2010 - Current
- Hospice of Yuma – 2008 – 2011
Treasurer – 2009 - 2011
- Casa Sierra Vista, Inc. – 2010 – 2011
- Gila Ridge High School Spiritline Booster Club - 2009 – 2011
Secretary – 2010 - 2011

AWARDS

- 2008 National Guardianship Association Outstanding State Affiliate Award
- 2010 Arizona Fiduciaries Association Leadership Award (Nominated by AFA Membership)

PRESENTATIONS/ARTICLES

- January 2005 – People for the USA
Presentation: *End-of-Life Planning – Are you prepared?*
- March 2005 – Forum on Social Security – Personal Invitation from Rep. Raul Grijalva
Presentation: *The Privatization of Social Security*
- April 2005 – YRMC – Huffers and Puffers Support Group
Presentation: *Elder Abuse – How to Recognize it and When to Report*

- May 2005 – Catalina Square Apartments
Presentation: *End-of-Life Planning – Are You Prepared?*
- October 2005 – First Annual Canadian Conference on Elder Law
PANEL Presentation: *A Global View of Guardianship*
- April 2006 – Yuma Proving Grounds Safety Days
Presentation: *Elder Abuse – How to Recognize it and When to Report*
- November 2006 – National Active and Retired Federal Employees Association
Presentation: *End-of-Life Planning – Are you prepared?*
- December 2006 – Arizona Fiduciaries Association, Inc. Conference “How to Avoid Regulatory Liability in Your Practice”
Presentation: *Audit and Quality Assurance Strategies and Procedures*
- February 2007 – Arizona Fiduciaries Association, Inc. Conference “Partnering for Success”
Presentation: *AOC Code Revisions – What it Means to You*
Presentation: *Partnering with Fiduciaries and other Professionals*
- July 2007 – Arizona Fiduciaries Association, Inc. Conference “Decision Making: Protecting Your Shop, Your Clients and Your Reputation”
Presentation: *Making the Right Decisions for Your Wards*
Presentation: *Decision Making Case Studies*
- April 2007 – Caregiver Support Group
Presentation: *End-of-Life Planning – Are you prepared?*
- February 2008 – Arizona Fiduciaries Association, Inc. Conference “To Serve and Protect”
Presentation: *Changes to the Probate Rules*
- April 2008 – Yuma Proving Grounds Safety Days
Presentation: *End-of-Life Planning – Are You Prepared?*
Presentation: *Elder Abuse – How to Recognize it and When to Report*
- May 2008 – Governor’s Conference on Aging “Myth Busters”
Presentation: *End-of-Life Planning – Are You Prepared?*
- July 2008 – Arizona Fiduciaries Association, Inc. Conference “Hot Issues and New Legislation Affecting Your Practice”
Presentation: *Potential Administrative Code Changes/Update on Public Records Request*
Presentation: *Probate Rules: Policy Drafting*
- August 2008 – Desert Rose Retirement Community
Presentation: *Identity Theft and Fraud Awareness*
- February 2009 – Arizona Fiduciaries Association, Inc. Conference “Building Your Network: Maximizing Effectiveness in Times of Diminished Resources”
Presentation: *Conservatorship 101*
- February 2009 – Yuma Chapter of the Arizona Credit Unions’ League
Presentation: *Elder Abuse – How to Recognize It and When to Report*

- June 2009 – AEA Federal Credit Union (All Staff Training)
Presentation: *Elder Abuse – How to Recognize it and When to Report*
- September 2009 – Yuma County Elder Abuse Task Force
Presentation: *What is a Fiduciary?*
- March 2010 – Arizona Fiduciaries Association, Inc. Conference “The Complexities of Care in the 21st Century”
Presentation: *Fiduciary Fees and Billing Practices*
- May 2010 – Arizona Fiduciaries Association, Inc. Blog
Article: *Understanding Proposition 100*
- July 2010 – Arizona Fiduciaries Association, Inc. Conference “Nothing is Certain but Death and Discharge”
Presentation: *Shared Decision Making Panel Presentation & Case Study Work Group*
- February 2011 – Arizona Fiduciaries Association, Inc. Conference “The Practice, Ethics and Politics of Compassionate Care”
Presentation: *Making the Dream of a Paperless Office a Reality*
- July 2011 – Arizona Fiduciaries Association, Inc. Conference “Transparent Standards and Rigorous Reform: A Blue Print for Action to Protect Arizona’s Vulnerable”
Presentation: *Strengthening Protection and Services for Arizona’s Vulnerable Through Case Analysis And Policy Reform*
- May 2012 – State Bar of Arizona Probate Litigation Committee
Presentation: *Advanced Issues (And New Rules!) in Probate and Estate Planning*
- July 2013 – Arizona Fiduciaries Association, Inc. Conference “Get Those Policies In Order”
Presentation: *Overview of AFA Policy Guide*