



February 2022

A Note from Our Executive Director

Happy New Year! As we welcome another year, we are excited about the new beginnings and opportunities that it brings. In that spirit, this edition of CoG Happenings is dedicated to growth. Historically, the nonprofit sector has seen its greatest growth during times of upheaval, and this certainly rings true for CoG.

Despite the adversities posed by the ongoing pandemic, 2021 was a year of tremendous growth in almost every one of our service areas. The COVID pandemic has been a reminder that life can abruptly change at a moment's notice. For many people, this realization has sparked an urgent interest in planning for their own needs and the needs of their adult children with disabilities. With this growth in demand for financial and healthcare decision-making support comes the opportunity to expand programs and services. Please read on to find out how CoG is rising to meet the needs of our community and serve as a safety net for those individuals and families seeking peace of mind at this challenging time.

We look forward to working alongside each of you towards achieving our mission in 2022. If you have suggestions or feedback or if CoG can ever be of any assistance to you or your clients, please do not hesitate to contact me at **336-273-5389 ext. 101** or dorian@corpguard.org.



Our Services Are Growing!

Historically, CoG has served as trustee of three kinds of Special Needs Trusts (SNTs), including individual first-party SNTs, pooled first-party SNTs, and individual third-party SNTs. But we are excited to report that we are expanding our trust services to offer a **Third-Party Pooled SNT**. We hope to begin accepting new beneficiaries into this trust beginning Spring 2022.

A pooled SNT can be either a first- or third-party trust. A first-party sub-account must be initially funded with resources belonging to the beneficiary and can be established by the beneficiary themselves, a parent, a grandparent, or the court. Alternatively, a **Third-Party Pooled SNT** can be created and funded by anyone except the beneficiary. In addition, the resources used to fund a third-party sub-account must have always been owned by someone else, a "third party," and not the beneficiary.

The benefits to joining CoG's Third-Party Pooled SNT include:

- The Grantor can name the remainder Beneficiary.
- There can be multiple Grantors.
- If a trust's contribution is too small to warrant the cost of setting up a standalone trust, or there's no one available to administer it, CoG's third-party pooled SNT is a practical and affordable alternative.
- The trust can be set up and funded now or deferred until funds are distributed under an estate plan.
- The Third-Party Master Trust has already been created and approved; therefore, it does not

Photo of disabled man



require an attorney to prepare a trust document.

- CoG holds beneficiaries' money in a pooled account with money from other participants, reducing investment and administrative expenses, which is ideal for smaller trusts.
- As we do with all trusts, CoG keeps accurate records of each sub-account within the pool and makes distributions from an individual sub-account.
- Each participant will receive investment income and pay investment expenses, according to the percentage each participant represents as part of the total pool.

For more information about CoG's Third-Party Pooled Trust, please contact Hannah Vaughan, General Counsel, at hannah@corpguard.org.

Our Team Is Growing!

Photo of the CoG team February, 2022



Corporation of Guardianship Team

Back Row: Carey Rongitsch, Saskia Barnard, Sarah Ward, Dorian Sylvester, Maria Gonzalez, Sammi Bailey, and Tiffany Simmons.

Front Row: Anne Johns, Candy Albrecht, Hannah Vaughan, and Sonya Tomlinson.

Introducing Tiffany Simmons, Elder Justice Care Manager



CoG is excited to announce that we have been awarded a two-year grant to launch a new service area, Elder Justice Care Management. Tiffany, a native of High Point, loves to spend time with her family. She is married with two girls, and she loves watching them succeed in their own lives and careers. Tiffany also enjoys traveling— whether to try a new experience just down the road or to a faraway country. Her passion is helping people become their best selves and building support and resources to best serve each person. Her work experience has primarily been agency counseling and casework. She spent 15 years working with Arc of High Point, now Monarch. She

finds it especially rewarding to work with special populations—those with special needs, substance abuse, and mental illness—to achieve goals they previously discouraged from striving towards.

In the role of Elder Justice Care Manager, Tiffany provides care management services for clients who have either been victims of elder abuse, neglect, and/or exploitation or who are at risk of being victimized and who do not meet the criteria for Adult Protective Services (APS) but who are in need of support to ensure their safety and well-being; or those individuals who have received intervention through APS but who continue to be at-risk and require additional assistance to prevent revictimization. In addition, Tiffany serves as a victim advocate and facilitator of communication to help the client navigate the complex criminal justice and social service systems.

For more information about CoG's Elder Justice Care Management services, please contact Tiffany at tiffany@corpguard.org.

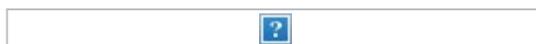
Introducing Sammi Bailey, Executive Assistant



We are also excited to introduce Sammi Bailey, who is bringing her enthusiasm and expertise to the newly created Executive Assistant role on the CoG team. Born and raised in Greensboro, Sammi attended Grimsley High School and the University of South Carolina, where she obtained a degree in Human Resource Management and Marketing. She brings a blend of experience from both the local nonprofit and nationwide corporate sectors. She enjoys spending time with her loved ones and dog, though most of her free time is currently spent planning her upcoming wedding. She is an avid sports fan and foodie who enjoys both cooking and eating adventurously!

As Executive Assistant, Sammi wears many different hats at CoG to help the organization run smoothly. One of Sammi's primary roles is to serve as the first point of contact for prospective clients. Having a dedicated team member focused on intake has allowed us to improve our internal procedures to make our intake process less cumbersome for families, referring professionals, and staff alike. Through phone and email conversations with prospective clients, Sammi will learn the details of their needs, manage each step of the onboarding process, and help to ensure that CoG meets the client's needs and expectations.

To refer a prospective client to CoG, please contact Sammi at sammi@corpguard.org.



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The Corporation of Guardianship is a private, non-profit organization providing fiduciary services and care management to vulnerable persons based on person-centered principles.

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