

## Timeline of Events

**1990-2010:** Hundreds of allegations of abuse by guardians are reported across 45 states and the District of Columbia.

**2010:**

- A GAO report (GAO-10-1046) reveals widespread financial exploitation, neglect, and abuse of seniors under guardianship in 20 closed cases across 15 states and D.C.
- The report details common failures including inadequate screening of guardians, lack of court oversight, and poor communication between courts and federal agencies.
- The report highlights the case of a former taxi driver in Missouri who embezzled over \$640,000 from an 87-year-old man with Alzheimer's, leaving him in squalor.

**2012:** Patricia Feeley is targeted for removal as her son's guardian by the Department of Developmental Disabilities (DDS) due to disagreements over his care plan.

**2013:** DDS drops their petition against Patricia Feeley after proposing to appoint an attorney with no prior connection to her son as his guardian.

**2015:**

- A blog post highlights the issue of guardian rights, particularly for families of individuals with developmental disabilities, and discusses the proposed bill H.1459.
- The bill aims to prioritize family members as guardians and reduce reliance on potentially disconnected attorneys or corporate providers.
- The post cites the cases of Patricia Feeley, Sara Duzan, and Andy McDonald as examples of families struggling within the guardianship system.

**2016:** A decision by the Supreme Judicial Court (SJC) potentially strengthens the rights of family members denied contact with their loved ones under guardianship.

**2018:** An advocacy group raises the question of whether individuals with profound intellectual disabilities truly require guardians.

**2023:**

- Arizona Governor Katie Hobbs signs a bill establishing a probate advisory panel to address issues within the adult guardianship and conservatorship system.
- Bill Chalmers, a victim of guardianship abuse, testifies before the state's fiduciary board about his experience with East Valley Fiduciary Services (EVFS).
- EVFS is censured and placed on probation for its handling of Chalmers' case, but he objects to their potential early release from probation.
- The Arizona fiduciary board reports 40 open investigations into complaints, highlighting the need for continued reform within the probate system.

## Cast of Characters

**Gregory D. Kutz:** Author of the 2010 GAO report on guardianship abuse. Contact person for further information on the report.

**Patricia Feeley:** Mother who fought against DDS attempts to remove her as guardian for her son.

**Sara Duzan:** Young woman with a developmental disability whose family was removed as her guardians, leading to alleged abuse and restricted family contact.

**Judge George Phelan:** Norfolk County Probate Court Judge who removed the Duzan family as Sara's guardians and appointed a corporate provider in their place.

**Stan McDonald:** Father who relinquished guardianship of his intellectually disabled son, Andy, and later advocated for reform due to subsequent poor care decisions.

**Andy McDonald:** Intellectually disabled individual whose care suffered under court-appointed guardians after his father relinquished guardianship.

**David Linsky:** Massachusetts Representative and author of H.1459, aiming to reform the guardianship system and prioritize family involvement.

**Katie Hobbs:** Arizona Governor who signed a bill in 2023 creating a probate advisory panel to address concerns within the adult guardianship system.

**Sherry Lund:** Advocate for probate reform in Arizona, celebrating the creation of the advisory panel.

**Bill Chalmers:** Victim of guardianship abuse who testified before the Arizona fiduciary board about his experience with EVFS.

**Mark Dangerfield:** Attorney representing East Valley Fiduciary Services (EVFS), disputing the findings against the company.

**Aaron Nash:** Director of the Arizona fiduciary board, acknowledging the need for improvements and highlighting ongoing efforts to address case backlogs.