

APPLICATION FOR GUARDIAN AD LITEM REGISTRY
Guardianship/Probate/Trust – Title 11

Mail or deliver the completed application, with all attachments, to:

Kitsap County Superior Court Administrator
614 Division Street, MS-24
Port Orchard, WA 98366

Name: Heather L. Crawford
Business Name or Firm: Robin H. Balsam PS
Business Address: 609 Tauma Ave S
City and State: Tauma, WA Zip Code: 98402
Business Phone: 253 627-7605 Fax: 253 572-0912
Email Address: hlebalsamlaw.com

- Non-Attorney Attorney WSBA or Washington State Certification No: 29962
- I am willing to serve as a Guardian ad Litem for Guardianships at public expense.
- I have no pending investigations or action against me involving felony allegations, professional certification or license suspension and/or revocation.
- I agree to advise the court immediately in the event of any complaint, investigation or action being commenced which could lead to professional discipline, or the suspension or revocation of my professional license, or to the filing of criminal charges for felony or crime involving allegations of theft, dishonesty or moral turpitude.
- I have read and agree to be bound by the Kitsap County Superior Court Guardian ad Litem Registry Code of Conduct.

Summary of my experiences as a GAL including years of experience and number of appointments.

I have 4.5 years experience as a guardian ad litem in Pierce County for title 11-88 matters. I have been appointed on ten matters as a guardian ad litem and attorney for the aip. I also have over 5 years experience as an attorney in private practice in all manner of guardianships and probate.

Number of times serving as a Guardian as Litem that I have been removed for failure to perform my duties as a Guardian ad Litem: 0

I include the following with my application (please check all applicable boxes):

- Curriculum vitae, showing work and professional or personal experience in or related to the field that would assist in the performance and completion of Guardian ad Litem duties;
- Completed Washington State Patrol Conviction Criminal History;
- Signed release of information directed to all professional regulatory bodies which have licensed or supervised the applicant within the last ten years;
- Copies of any any professional complaints, investigations or disciplinary actions, lawsuits or professional liability claims filed, whether pending or completed, including a statement for each setting out the current status and any applicable response to said claims;
none
- Copies of any order for removal of the Guardian ad Litem prior to completion of the Guardian ad Litem's duties;
none
- Description of any claims or litigation that has been commenced, involving allegations of improper fee charges, charges of fraud, theft or other forms of dishonesty or professional malpractice or misconduct;
none
- Copy of fee schedule;

AND, EITHER

- Certificate of Qualification/Training for Guardian ad Litem seeking appointment under RCW Title 11,

OR

- I am currently on the Guardian ad Litem Registry and have included a certificate of updated training taken within the last year

I certify under penalty of perjury under the laws of the State of Washington that the foregoing is true and correct.

DATED: 6-1-2011

Paume
City Where Signed

[Signature]
Signature of Applicant

Heather Crawford
Printed Name

HEATHER L. CRAWFORD

(253) 627-7800
hc@balsamlaw.com
609 Tacoma Ave. S., Tacoma, WA 98402

PROFESSIONAL EXPERIENCE

Attorney, Robin H. Balsam PS 3/2006-present

- Draft court pleadings related to guardianship and probate cases.
- Represent clients in complicated guardianship and probate matters.
- Interview elderly and disabled clients including advocating for them to protect client's best interests based on their goals.
- Negotiate settlements in contested matters.

Attorney, Frost & Associates, PC 2/2006 – 3/2006

- Drafted probate pleadings related to community property agreements, intestate, and testate estates.
- Drafted deeds transferring property subject to community property agreements.

Staff Attorney, Chambers of U. S. District Judge Robert J. Bryan 7/2003 – 8/2004

- Researched issues and drafted orders for federal judge including orders on dispositive motions on topics such as employment discrimination, 42 U.S.C. § 1983, insurance contract interpretation, social security, and constitutional violations.
- Applied chamber's ethical standards to negotiate settlement of pre-trial disputes.
- Collaborated with clerks and judges to formulate resolution of issues.
- Managed docket and prioritized projects to keep docket current.

Attorney, Law Offices of Gregory J. Murphy, P.S. 3/2003 – 6/2003

- Independently researched the evolution of the Americans With Disabilities Act and prepared 90-page outline for distribution at continuing legal education seminar.
- Worked on team to facilitate planning and opening of new law office.

Attorney, Lowenberg, Lopez & Hansen, P.S. 4/2001 – 2/2003

- Independently researched and wrote hundreds of diverse pleadings and memoranda.
- Participated in settlement negotiations and persuasively presented motions to court.
- Analyzed potential case files and presented findings to partners for review.
- Objectively listened to client's issues and forecasted outcomes.
- Prioritized projects to fulfill the expectations of three partners.
- Facilitated all phases of professional communications.
- Diligently pursued client's best interests and goals.

EDUCATION

Seattle University School of Law, Seattle, WA
Juris Doctor, Cum Laude

1999

University of Washington, Seattle, WA
Bachelor of Arts Degree, Economics

1993

RENEWAL FOR PIERCE COUNTY SUPERIOR COURT GAL TITLE 11 REGISTRY

F(2): Training with Month/Year Attended

DATE	DETAILS
10/24/2006	Title: Ethics for Elder Law Attorneys, sponsored by Washington and Oregon CLE Forum. Topics: Changes to Rules of Professional Conduct - new mandatory duty of disclosure; representing multiple clients; advanced costs & expenses now contingent; and confidential information Re: prospective clients; & may disclose breach of fiduciary duty when someone is serving as court-appointed fiduciary.
11/1/2006	Title: 5 th Annual Guardianship Seminar: sponsored by Tacoma-Pierce County Bar Association Guardianship Committee. Topics: accountings, Pierce County Local Rules, Selling Real Estate, Evaluating AIPs, Vulnerable Adult Statute; Estate/Gift Tax, Income Tax filing, Medicaid & Annuity Treatment, Ethics, VA Benefits, and Obtaining Financial Statements.
1/17/2007	Topic: Continuing Legal Education Seminar: "Role of Counsel When a Party Has Diminished Capacity - Ethical and Liability Considerations".
1/19/2007	Title: Essential of Elder Law: Tedra & How to Protect Your Client: sponsored by WSBA. Topics: efficiently using Tedra Petitions to benefit your clients, technology and privacy concerns (identity theft) related to vulnerable adults; common scams targeting senior consumers; financial exploitation of vulnerable adults; and Rules of Professional Conduct.
5/3-4/2007	Title: 2007 Title 11 Guardianship Guardian ad Litem Training. Topics: all facets of guardianship petition and deciding if guardianship is appropriate; undue influence; county registry; vulnerable adult petitions; personal safety for the GAL; scope of GAL investigations; and billing.
6/5/2007	Title: Essential of Estate Planning and Probate Practice. Topics: living trusts; living wills; gifting; probate avoidance; fee agreements; and jurisdiction.
7/19-20/2007	Title: Guardianship Institute. Topics: overview of process; 90-day reports; guardianship of estate issues; guardianship of person issues; petition for instructions; termination of a guardianship and final report; ethics; various roles of counsel in guardianship; attorney fees; professionalism; developmentally disabled; vulnerable adult petitions; and mediation.
9/8/2007	Title: Guardianship of Marshal. Topics: third-party custody issues related to guardianship.
10/16/2007	Title: TPCBA. Topics: Fiduciary duty and guardianship.
2/19/2008	Vulnerable Adult Protection Orders. During this CLE, we covered matters related to obtaining Vulnerable Adult Protection Orders, including the burden of proof for an order, the process, bonding of the

	petitioner, and the applicability and usefulness of such orders.
3/7/2008	Title: Forensic Accounting. This was a day-long seminar focusing on how to pull together a forensic accounting of an alleged incapacitated person's estate. We focused on the key documents needed for a forensic accounting and the process for putting together such an accounting in a most efficient manner. The seminar also covered issues related to spotting unauthorized gifting and the process for tracking down such gifting.
3/11/2008	Title: Secrets to Successful Investigations. This CLE was a very practical CLE in that it covered using credit reports to find out the debts of a person. It also provided information on how to use essentially free internet resources to track down people. It covered the usefulness of credit headers in credit reports and the different types of credit reports. The CLE also spent considerable time on using the internet to find information through public records.
4/15/2008	Title: Prosecuting Those Exploiting Vulnerable Adults. This was an hour-long CLE sponsored by the Tacoma-Pierce County Bar Association. A prosecutor came and spoke on the types of people that they are prosecuting for exploiting vulnerable adults. She presented information on putting together a useful case, the types of evidence they are looking for in prosecuting those people, as well as what types of evidence are useful in pursuing that prosecution.
5/16/2008	Title: Annual Guardian ad Litem Training. This was an all-day seminar in Seattle to renew my eligibility for the GAL registry. Some of the topics included in this CLE include how to diffuse conflict and using conflict resolution skills in guardianship and other matters. There was a case law update and discussion on different roles that a GAL serves in different matters such as being an investigator in a guardianship, when you are appointed to represent an AIP, and also in a vulnerable adult protection order case.
5/20/2008	Title: Payment of Fees and the New Fee Cap from DSHS. This was an hour-long presentation from a DSHS worker that helped guide guardians in collecting fees on DSHS cases.
7/15/2008	Title: Substantiating an APS Case. This was a presentation from an assistant attorney general on the process that APS goes through in investigating intakes, and also the processes related to substantiation and what it takes to substantiate an APS case.
9/16/2008	Title: Crisis Services of Pierce County. This was a presentation from a Pierce County employee who works for the Pierce County Crisis Center. He provided background and information as to what type of people the center treats and the process of how people are admitted and placed in

	facilities.
11/6/2008	Title: 7 th Annual Guardianship Seminar. I was the chair of the Tacoma-Pierce County Bar Association Guardianship Committee for the year 2008, and I organized this seminar. Topics covered included representing people who are incapacitated under RCW 4.08.060, emergency guardianships and informed consent, the domestic partnership bill, the perception of self-dealing and conflicts of interest as presented by commissioners, how to use a nurse care manager in a case, an ethics/morals presentation. There was also a presentation on the pre-appointment interaction between Guardians ad Litem and guardians, and a presentation from representatives of the Certified Professional Guardian Board as to what guardians are doing well, what they need to improve upon, and what leads up to investigation of a guardian.
Sept. 2008 - Jan. 2009	During this time period, I attended the University of Washington guardian certification program, which was about a 90-hour program and is required for the certification of guardians in Washington State. This was the first time this program was conducted. Basically, all issues related to acting as a professional guardian were covered. I passed the class and am now a certified professional guardian.
January 23, 2009	Title: Elder Law Essentials: the Critical Foundation for Your Elder Law Practice. This seminar covered a lot of issues related to estate planning, as well as probating an estate for an elder law client. It also dealt with some of the more complicated issues related to probate.
1/9/2009-1/31/2009	Title: UW Guardianship Certificate, Guardianship Ethics, Problem Solving and Business Opportunities. This was a class conducted by the UW Extension Program to certify professional guardians in the State of Washington. This was the first year of this program. I obtained 17 general live CLE credits, as well as 6 ethics credits during this session of the course. The topics covered in this portion of the course included work on the verified inventory and budget, handling personal property, sale of real property, investment planning and taxes, lawsuits, notice of change in circumstances, and culminated with the completion of annual accountings.
4/23/2009	Title: King County Bar Association Annual Guardian ad Litem Training. This was a day-long seminar related to the renewal of Guardian ad Litem training. Some topics included handling disputes between siblings and preserving the dignity of the elderly, mediation techniques for resolving family warfare, how to accomplish dignity in the courtroom, ethics on how to stay out of trouble, and a review of the new procedures applicable to King County.
3/2/2009	Title: Research with Lexis Representative. This was a one-hour long CLE

	conducted over the phone with Lexis representative Mallory. This CLE was specific to our office. Two attorneys attended the CLE. The purpose of this CLE was to obtain advanced legal research skills.
4/24/2009	Title: King County Bar Annual Guardian ad Litem training.
5/7/2009	WAPG Spring Training for guardians re disability, social security, and managing/advocating for client's health issues.
5/14/2010	King County Bar Annual GAL training.
10/15/2010	Elder Law Conference: recognizing and resolving conflicts from all parties/aspects of matters.
11/8/2010	9 th annual TPCBA seminar: services from Department of Social and Health Services.

Certificate of Completion

King County Bar Association

Heather Crawford

**2007 Washington State
RCW 11.88.090 Guardianship
Guardian ad Litem Training
Initial Certification
May 3 & 4, 2007**

12 General & 1 Ethics CLE Credits Approved for May 3 & 4, 2007 (approval #179 754)

May 3: 6.50 General/May 4, 2007: 5.50 General and 1.00 Ethics Credits

9.50 CPG Credits Approved for May 3 & 4, 2007 (2.50 Person; .50 Estate; 5.50 General; 1 Ethics)

May 3: .50 Estate; 2.25 Gen; 1.75 Person; 4.50 TOTAL; May 4: 1 Ethics; 3.25 Gen; .75 Person; 5.0 TOTAL



Roxanne Mennes, King County Bar Association CLE Director



Certificate of Completion

King County Bar Association

Heather Crawford

**2011 Washington State
RCW 11.88.090 Guardianship
Guardian ad Litem Training**

**Re-Certification
May 6, 2011**

Friday, May 6, 2011:

5.50 General & 1.00 Ethics CLE Credits Approved (approval #284 880)

Professional Guardian Credits: 5.75 Total: 2.00 Person; 1.00 Ethics; 2.75 General



Denise Medlock, Senior Continuing Legal Education Manager, King County Bar Association



Web Search Transcript

Washington State Patrol
 Identification and Criminal History Section
 P.O. Box 42633
 Olympia, Washington 98504-2633
 Telephone (360) 534-2000

THE FOLLOWING TRANSCRIPT OF RECORD
 IS FURNISHED FOR OFFICIAL USE ONLY

This report was generated from a transaction run on 05/19/2010 at 10:19
 Conviction Criminal History RCW 10.97.050(1)

Pursuant to the purpose of inquiry, NO EXACT MATCH was found in the Washington State Criminal History Repository based on the descriptors provided:

CRAWFORD, HEATHER L

This may mean that the person you searched for has no criminal conviction record OR that your search criteria do not match the person's name spelling or date of birth.

WATCH did return the following candidate list based on the provided search descriptors:

SID	NAME	SEX	RACE	HT	WT	EYES	DOB
1.	CRAWFORD, HEATHER NOELLE	F	W	504	130	BRO	
2.	CRAWFORD, HEATHER R	F	W	507	225	HAZ	
3.	CRAWFORD, HEATHER DAWN	F	W	507	170	BRO	

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IN THE SUPERIOR COURT OF THE STATE OF WASHINGTON
IN AND FOR THE COUNTY OF PIERCE

In re the Guardianship of:

NO. _____

STATEMENT OF GUARDIAN AD
LITEM FEES

An Incapacitated Person.

COMES NOW the Guardian ad litem herein, HEATHER L. CRAWFORD of
ROBIN H. BALSAM P.S. and presents this Declaration of Fees with the attached
billing statement reflecting the fees and costs incurred in this matter in the
amount of \$ _____, at the hourly rate of \$210.00 for _____

This is for the Court's review on the date of hearing in this matter of

I certify under penalty of perjury according to the laws of the State of
Washington that the foregoing is true and correct.

DATED this _____ day of _____, 20__ at Tacoma,
Washington.

ROBIN H. BALSAM P.S.

HEATHER L. CRAWFORD, WSBA#29962
Guardian ad Litem

STATEMENT OF GUARDIAN AD LITEM
FEES - 1