

Certified Professional Guardianship and Conservatorship Program

2023 Online Agency Recertification Instructions

To recertify online, click on the link below:

1. <http://www.courts.wa.gov/guardianportal/>
2. Click on “Certified Professional Guardian and Conservators”
3. On the left side of the page, click on “CPGC Program”
4. Click on “Application & Account Maintenance”
5. Click on “Recertify” and enter your CPGC Agency License Number and Password.

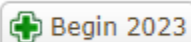
If you don't remember your license number or password, click on “I forgot my license number” or “I forgot my password” and enter the email address associated with your account. The license number or password will be sent to that address immediately.

Once logged in, please click on the **Begin 2023** button to start the recertification process:

Recertification List

Instructions

Please select the calendar year record you wish to view and/or edit, or click the Begin button to start the recertification process for the next fiscal year.

 A button with a green plus sign icon and the text "Begin 2023".

There are six steps required to complete recertification:

Completion Steps

- Step 1: Profile Information
- Step 2: Disclosure
- Step 3: E & O Insurance Declaration
- Step 4: Guardians, Officers & Declaration
- Step 5: Review & Summary
- Step 6: Payment

Step 1: Profile Information

- Please assure your agency contact information, physical address and mailing address is current.

Step 2: Disclosure – License No.

- Please respond to each question “Yes” or “No”. **The buttons default to “No”**
- There are nine questions. If you answer “Yes” to a question, a second screen will pop up for an explanation of circumstances.

Step 3: E&O Insurance Declaration

- You must answer both questions at the E&O Insurance Declaration.
- If the answer to either question is “No” you are required to send a copy of your E&O Insurance to the Certified Professional Guardianship and Conservatorship Program.

Errors & Omissions Insurance Requirement

If the answer to EITHER OF the following two questions is "no" you are REQUIRED to have E&O insurance.

CPG and CPGAs who are exempt from requirements to have E & O insurance are permitted to pay lower annual certification renewal fees. To qualify, a CPG or CPGA must have 25 or fewer guardianship case appointments at one time, and with less than \$500,000 total countable guardianship assets under management ([CPG Regulation 704](#))

Do you, an individual certified professional guardian or agency, have 25 or fewer guardianship case appointments? No Yes

Do you, an individual certified professional guardian or agency, have less than \$500,000 total countable guardianship assets under management? No Yes

Step 4: Guardians, Officers, & Declaration

Instructions

Each CPG Agency is required to assign at least two designated guardians with final decision-making authority for incapacitated persons served by that agency. Please list two designated guardians below and confirm that they are covered by the agency's insurance.

Select Designated Guardians

Available CPGs	Designated CPGs
Abbott, Candace	<input type="checkbox"/> Ang, Ferd
Abercrombie, Wendy	<input type="checkbox"/> Doe, Jane
Ahl, Kevin	
Allison, Connie	
Altman, Susanne	
Anderson, Jim	
Arrowsmith, Elizabeth	
Arthur, Leesa	
Ayers, Christopher	

Step 4: Guardians, Officers, & Declaration (continued)

Instructions

List the names of all certified professional guardians working at your agency. Please indicate whether each guardian is covered by the agency's insurance.

Please note: Each of these guardians must also submit a separate individual guardian recertification.

List Associated Guardians

Available CPGs	Associated CPGs
Abbott, Candace	<input type="checkbox"/> Remove <input checked="" type="checkbox"/> Mark Insured
Abercrombie, Wendy	Full Name Insured
Ahl, Kevin	
Allison, Connie	
Altman, Susanne	
Anderson, Jim	
Arrowsmith, Elizabeth	
Arthur, Leesa	
Ayers, Christopher	

Instructions

Please list the name and position for all of the agency's current board of directors, managers, owners, and/or officers. All officers and directors must meet the qualifications of Chapter 11.88.020 RCW for guardians. They must:

1. Be eighteen years of age
2. Be of sound mind
3. Not have been convicted of a felony or of a misdemeanor involving moral turpitude
4. Be a person whom the court finds unsuitable

If a nonresident of this state, they must have appointed a resident agent to accept service of process in all actions or proceedings with respect to the estate and caused such appointment to be filed with the court.

Agency Officers

Type	First Name	Middle Name	Last Name

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Instructions

Please complete the following declaration.

Declaration

I declare, under penalty of perjury, that all of the information provided in this form is accurate.

Date Signed:

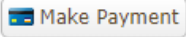
Place Signed:

Signing Party:

Step 5: Review & Summary

- Please assure all information is correct, and all questions have been answered at the Review & Summary screen.

Step 6: Payment

- The payment amount due is calculated dependent on the E&O Insurance requirement.
- Click on  and enter your payment information at the Secure Payment Gateway
- When finished entering payment information, click on 