

## TRUSTEE

### *What is a Trustee?*

A Trust is a legal arrangement that allows a person to deposit assets and have them distributed at a later time according to certain predetermined instructions.

A trustee is the court appointed party who oversees the trust while it holds assets. The trustee is regulated by the Court.



## CONTACT US AT:

### **Central Wisconsin Community Action Council, Inc.**

#### **Guardianship Department**

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Services provided by CWCAC for qualified participants in Adams, Columbia, Dodge, Juneau, Sauk Counties:

Section 8 Housing Voucher Program  
Emergency Housing Assistance  
Crisis Assistance Program  
Car Loan Program  
Weatherization and Energy Assistance  
Small Business Assistance  
Emergency Food Pantries  
Low Income Housing  
Technical Assistance Program for New Businesses  
Tuition Assistance Program for Education

### **CWCAC Central Office**

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### **Our Local Community Action Agency Offices**

**Adams County**  
1874 Hwy 13  
PO Box 647  
Friendship, WI 53934  
Ph: (608) 472-2687  
Fax: (608) 339-9955

**Columbia County**  
203 DeWitt St.  
Portage, WI 53901  
Ph: (608) 742-3320  
Fax: (608) 742-0984

**Dodge County**  
134 South Spring St.  
Beaver Dam, WI 53916  
Ph: (920) 885-9559  
Fax: (920) 885-9589

**Juneau County**  
534B La Crosse St.  
PO Box 253  
Mauston, WI 53948  
Ph: (608) 847-1124  
Fax: (608) 847-3009  
**Energy Assistance:**  
(608) 847-5988

**Sauk County**  
505 Broadway  
Job Center 2nd Floor  
Baraboo, WI 53913  
Ph: (608) 355-4812  
Fax: (608) 355-4816



### **Central Wisconsin Community Action Council, Inc.**



### **GUARDIANSHIP OF PERSON AND ESTATE**

#### **CONSERVATORSHIPS**

#### **TRUSTEE SERVICES**

#### **FEDERAL FIDUCIARY**

### **POWER OF ATTORNEY FOR FINANCES**

Helping individuals manage their money to meet their needs and assure them a better quality of life.

Currently providing financial services to clients

in the following counties:

- ADAMS
- COLUMBIA
- DODGE
- JUNEAU
- MARQUETTE
- MONROE
- PORTAGE
- SAUK
- WAUSHARA
- WOOD

(Also available to other counties in Wisconsin)

## GUARDIAN OF ESTATE

### ***What is a Guardian of Estate?***

A Guardian of the Estate is appointed by the Court and is responsible for financial management of the ward's assets and bill paying. The Court will require an annual accounting of the ward's assets.

### ***Who needs a Guardian of Estate?***

A Guardian of the Estate might be needed where there is no previously executed Durable Power of Attorney for Financial affairs or if an individual is mentally incapable of taking care of bill paying, investments and money matters.

## GUARDIAN OF PERSON

### ***What is a Guardian of Person?***

A Guardian of the Person is appointed by the Court and has responsibility for overseeing the care and living situation of the ward, as well as medical decision-making.

The guardian's role is to assist the ward in making decisions about the support services the ward will receive, where the ward will reside, and medical treatment for the ward. If the ward is unable to make decisions, even with assistance, the guardian of the person has the authority to make decisions for the ward.

## CONSERVATORSHIP

### ***What is a Conservatorship?***

Conservatorship is set up with the voluntary petition of the person seeking the financial assistance.

The conservatorship is a court supervised system under which the client voluntarily agrees to allow the agency to manage the client's estate.

After appointment, the conservator must file an initial inventory of all of the individual's assets with the court. The court will also require the conservator to file an annual accounting in which the income and expenditures are reported to the court. As a protective measure, the court may require the conservator to post a bond.

A conservatorship provides an individual with assistance in managing finances while retaining his or her rights.

### ***Who needs a Conservator?***

If you feel that managing your finances has become increasingly difficult or burdensome because of disability or other reasons, you may want to consider asking a court to appoint a conservator on your behalf to manage your finances.



## FEDERAL FIDUCIARY

### ***What is a Federal Fiduciary?***

The Department of Veterans Affairs selects and appoints or recommends for appointment of a legal entity to receive benefits in a fiduciary capacity for a beneficiary.

### ***Who needs a Federal Fiduciary?***

The Veterans Service Center Manager is authorized to select and appoint, or in the case of a court-appointed fiduciary, to recommend for appointment a legal entity best suited to receive Department of Veterans Affairs benefits in a fiduciary capacity. This service benefits someone who is mentally ill, incompetent or legally disabled.

## POWER OF ATTORNEY

### ***What is a Durable Power of Attorney for Finances?***

A Power of Attorney for Finances (POA) is a legal document that allows you to appoint a person or organization to manage all financial matters such as income and expense management including negotiating with creditors for reduced payments on your behalf.

### ***Who needs a POA?***

Anyone who feels in need of assistance to take care of their present financial situation and/or to plan for future financial decision-making in the event that they are unable to make their own decisions.