

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: ANGELA K. CARLSON-WHITLEY

Business Name or Firm: CARLSON-WHITLEY & LUTHER, LLP

Business Address: 222 Lee Street SW, Suite 112

City and State: Tumwater, WA Zip Code: 98501

Business Phone: (360) 915-9774 Fax: (360) 915-8759

Email Address: acarlson-whitley@gmail.com

- ☐ Non-Attorney ☒ Attorney WSBA or Washington State Certification No: 24186 .
- ☒ I am willing to serve as a Court Visitor for Guardianships/Conservatorships 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. Certified Title 11 GAL/CV 2010 to present and 1994-1995. Currently on registries in Thurston, Mason, Lewis, Grays Harbor, and Kitsap Counties, and have also been appointed as a Title 11 GAL by the Squaxin Island Tribe. Appointments to date: 250. Primary area of practice as an attorney: Guardianship/Conservatorship and Trust Administration—representing professional and family guardian/conservators, hospitals, facilities, and respondents.

Number of times serving as a GAL/CV that I have been removed for failure to perform my duties: None.

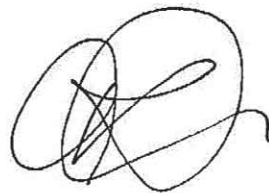
I include the following with my application (please check all applicable boxes):

- ☒ Curriculum vitae, showing work and professional or personal experience in or related to the field that would assist in the performance and completion of Court Visitor 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 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;
- ☐ Copies of any order for removal of the Court Visitor prior to completion of the Guardian ad Litem's duties;
- ☒ 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;
- ☒ Copy of fee schedule;

AND, EITHER

- ☐ Certificate of Qualification/Training for CV seeking appointment under RCW Title 11,
- OR***
- ☒ I am currently on the CV 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: 6/6/2024

Signature of Applicant

Tumwater
City Where Signed

ANGELA K. CARLSON-WHITLEY
Printed Name

ANGELA K. CARLSON-WHITLEY
Carlson-Whitley & Luther, LLP

222 Lee Street SW, Suite 112
Tumwater, WA 98501

(360) 915-9774 phone
(360) 915-8759 fax

SUMMARY

Experienced guardianship/conservatorship and trust administration attorney with robust practice advising and representing certified professional and family guardians/conservators, hospitals, facilities, and respondents in guardianship/conservatorship proceedings and representing professional and lay trustees. Certified Title 11 Court Visitor. Certified Professional Guardian/Conservator.

PROFESSIONAL EXPERIENCE

Carlson-Whitley & Luther, LLP—Tumwater, WA 2011 - present
Partner

- Title 11 Certified Court Visitor and Trust Guardian Ad Litem in Thurston, Mason, Grays Harbor, Kitsap, and Lewis Counties.
- Represent Certified Professional and Family Member Guardians/Conservators, Nursing Facilities and Hospitals, and Respondents in guardianship/conservatorship proceedings.
- Represent Professional and Lay Trustees; Trust Administration.

Sole Practitioner—Olympia, WA 2010 - 2011
Private Practice Attorney

- Title 11 Certified Guardian Ad Litem in Thurston, Mason, Grays Harbor, and Kitsap Counties.
- Represent Certified Professional and Family Member Guardians in guardianship proceedings.
- Contract work in guardianship proceedings for local guardianship attorneys.

Thurston County Volunteer Legal Services – Olympia, WA 2010 - 2016; 2019 - present
Volunteer Attorney

- Give legal advice to low-income clients on a variety of issues, including family law, landlord/tenant law, employment law, real property law, currently on guardianship/conservatorship matters only.

Joint Legal Assistance Office/Family Law Services – Camp Pendleton, CA 1999 - 2001
Volunteer Attorney/Family Law Specialist

- Researched family law issues.
- Drafted interoffice and legal memoranda along with documents for deploying service members. Prepared office and client correspondence.
- Performed client interviews.
- Gave appropriate legal advice to military families on a wide range of topics, including family law, immigration law, landlord/tenant law, contract law, and consumer law.
- Presented "Wills & Powers of Attorney" briefs to deploying units, explaining the importance of having a will, power of attorney, and power of attorney for health care before deploying overseas.

Legal Team Echo (Criminal Defense) – Camp Pendleton, CA 2000
Volunteer Defense Attorney

- Researched and wrote memoranda for supervising judge advocate on military criminal defense issues to be used to defend members of the Marine Corps being prosecuted under the UCMJ for offenses such as desertion, forgery, assault, drunk driving, and use or possession of controlled substances.

Lifetime Advocacy Plus, Certified Professional Guardianship Agency - Seattle, WA

1992 – 1995

In-house Counsel & Legal Services Coordinator

- Certified Title 11 Guardian Ad Litem, King, Snohomish, and Pierce Counties
- Drafted over 200 guardianship reports and accountings for Lifetime Advocacy Plus, a professional guardianship agency, as well as petitions for guardianship and other interim reports, trust accountings, and pleadings.
- Presented guardianship reports and accountings in person and by mail to various County Superior Courts.
- Performed a systematic review of all of Lifetime Advocacy Plus' guardianships in each of its five offices throughout the state.
- Developed and maintained a tickler system for guardianship reports and accountings.
- Managed all of Lifetime Advocacy Plus' guardianship reports and accountings, ensuring that they were filed in a timely manner, either in-house or through coordination with outside counsel of record.

The Honorable Thomas S. Zilly, U.S. District Judge - Seattle, WA

Jan. – April 1994

Judicial Extern

- Reviewed briefs, researched and analyzed substantive and procedural issues, wrote bench memoranda, and drafted orders.

Thurston County Office of Assigned Counsel – Olympia, WA

May – Nov. 1993

Legal Intern (Rule 9)

- Performed legal research, wrote memoranda and briefs.
- Conducted preliminary jail interviews.
- Assisted attorneys and participated in preliminary hearings and arraignments.
- Served as second chair in a felony trial, including writing the trial memorandum and motions in limine, assisting in voir dire, and conducting cross-examination of a witness.

EDUCATION

University of Puget Sound School of Law - Tacoma, WA – J.D.

The Evergreen State College - Olympia, WA,

B.A. in Literature and Cross-Cultural Studies

PUBLICATIONS

Comment, *Dowry Death: A Violation of the Right to Life Under Article Six of the International Covenant on Civil and Political Rights*, 17 U. Puget Sound L. Rev. 637 (1994).

ACTIVITIES

- **Chair**, Thurston County Guardianship Roundtable, Nov. 2010 – August 2018
- **Member**, Probate/Guardianship Pattern Forms Subcommittee, Jan. 2012 – present
- **Member**, GAL Training Standing Committee, June 2012 – 2020
- **Member**, WINGS Legislative Committee, inception - July 2016
- **Member**, WSBA Elder Law Section's Legislative Committee, Sept. 2013 – April 2015
- **Member**, Washington Women Lawyers Judicial Evaluation Committee, Sept. 2014
- **Secretary**, Mason County Bar Association, Jan. 2013 - present
- **Board Member**, Mason County Bar Association, Jan. 2013 – present
- **Member**, Thurston County Bar Association, January 2013 - present



Judith E. Luther
Angela K. Carlson-Whitley

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Tumwater, Washington 98501
Phone (360) 915-9774 • Fax (360) 915-8759

May 18, 2024

Kitsap County Superior Court
614 Division St., MS-24
Port Orchard, WA 98366

RE: Release of Information

To: Washington State Bar Association:

I am an attorney licensed to practice law in the State of Washington. My Washington State Bar Number is 24186. I hereby authorize the Washington State Bar Association to release any information necessary to determine my fitness to serve as a Title 11 Court Visitor/Guardian Ad Litem in adult guardianship and trust cases in Kitsap County to:

Frank A. Maiocco, Jr.
Court Administrator
Kitsap County Superior Court
614 Division Street, MS-24
Port Orchard, WA 98366
(360) 377-7140

This release of information includes, but is not limited to, all records and information concerning any official disciplinary action or a pending active investigation you have with regard to me.

Thank you.

Very truly yours,

Carlson-Whitley & Luther, LLP

Angela K. Carlson-Whitley
Attorney at Law

ACW:acw

CARLSON-WHITLEY & LUTHER, LLP
Attorneys at Law

Judith E. Luther
Angela K. Carlson-Whitley

222 Lee Street SW, Suite 112
Tumwater, Washington 98501
Phone (360) 915-9774 • Fax (360) 915-8759

Court Visitor/Guardian ad Litem Fee Schedule

I am a licensed attorney in Washington State, practicing primarily in the area of guardianship/conservatorship and trust administration.

My usual hourly rate is \$300.00. My private-pay hourly rate for Title 11 CV/GAL work is \$275.00, and for Trust GAL work is \$300.00. In county pay cases I am willing to reduce my hourly fee to the accepted county pay rate.

This information is meant to serve as information only to the court and potential parties and is not a fee agreement.

Professional Complaints:

I have never had any claims or litigation commenced against me as a Guardian ad Litem involving allegations of improper fee charges, charges of fraud, theft or other forms of dishonesty, professional malpractice, or misconduct, nor have I ever been accused of any unethical behavior.

I have had two grievances filed against me as an attorney. The first, in November of 2014, related to a guardianship proceeding in which I represented petitioner. Complainant family member alleged he did not receive notice of the hearing on a petition for guardianship. Disciplinary counsel reviewed the response and materials submitted and dismissed the grievance, which is not a matter of public record. The second, in February of 2017, also involved a complainant family member in a guardianship proceeding. This complaint was dismissed without any notice to me, did not require a response, and is not a matter of public record.

Conflict of Interest:

If I know of a conflict of interest or there is likely to be a conflict or the appearance of a conflict of interest in any case with which I am associated, I will immediately bring the information to the attention of the court and all the parties.

Signed this 6th day of June, 2024, in Tumwater, Washington.

CARLSON-WHITLEY & LUTHER, LLP



Angela K. Carlson-Whitley, WSBA #24186
Attorney at Law/Court Visitor/Guardian ad Litem

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7 IN THE SUPERIOR COURT OF WASHINGTON
8 FOR KITSAP COUNTY

9 In the Guardianship/Conservatorship of) No.
10 NAME RESPONDENT,) COURT VISITOR STATEMENT
11)
12 Respondent.)

13 TO: CLERK OF THE ABOVE-ENTITLED COURT;
14 TO: NAME RESPONDENT, Respondent;
15 TO: NAME ATTORNEY, Attorney for Petitioner;
TO: NAME NOTICE PARTY, Notice Party; and
TO: NAME INTERESTED PERSON, Interested Person.

16 COURT VISITOR STATEMENT OF QUALIFICATIONS

17 (This statement is presented as required by RCW 11.130.280, .380, and .605)

18 A. Requisite areas of background, knowledge, training, and experience are detailed below:

19 1. **Level of formal education:** J.D., May 1994, University of Puget Sound School of
20 Law, Tacoma, Washington; B.A., 1991, The Evergreen State College, Olympia, Washington;
Harvard University Extension School, Cambridge, Massachusetts, 1988-89. Certified
Professional Guardian/Conservator, May 13, 2021.

21 2. **Training related to Court Visitor's Duties:** Completion of King County Guardian
22 ad Litem/Court Visitor (CV) Training in May 2010 and annual re-certification through 2016 and
23 again in 2018 and 2021; completion of Kitsap County CV Training in 2017, 2019, and 2021
through 2024 (presenter); completion of Pierce County Guardianship/CV Training annually from
2013 through 2020 and 2022 (presenter 2021).

24 3. **Number of years' experience as a GAL/Court Visitor:** 15 (1994-95; 2010-present).

25 4. **Number of appointments as a GAL/Court Visitor as of June 6, 2024, by County:**
26 Grays Harbor – 37; King – 4; Kitsap – 49; Lewis – 20; Mason – 27; Pacific - 2; Snohomish – 1;
Squaxin Island Tribal Court – 2; Thurston – 108.

27 5. **Criminal History (as defined in RCW 9.94A.030):** None.
28

1 **6. Knowledge or experience in needs of:**

2 (a) **Impaired elderly:** Completion of GAL/Court Visitor Training and annual re-
3 certification since 2010. Familiarity with medical conditions of elderly persons, such as
4 dementia and other neurocognitive impairments, and non-medical problems of aging,
5 including functional capacities, incapacities, and needs of elderly persons. Work
6 experience as In-house Counsel for a professional guardianship organization with elderly
7 clients and as a guardianship attorney and GAL/Court Visitor.

8 (b) **Persons with physical disabilities:** Completion of GAL/Court Visitor
9 Training and annual re-certification since 2010. Familiarity with the capacities,
10 incapacities, and needs of persons with physical disabilities as described in the GAL
11 Handbook. Personal experience of having a sister with physical disabilities. Work
12 experience as In-house Counsel for a professional guardianship organization with
13 physically disabled clients and as a guardianship attorney and GAL/Court Visitor.

14 (c) **Mental illness:** Completion of GAL/Court Visitor Training and annual re-
15 certification since 2010. Familiarity with the capacities, incapacities, and needs of
16 persons with mental illness as described in the GAL Handbook. Work experience first as
17 In-house Counsel for a professional guardianship organization with mentally ill clients
18 and as a guardianship attorney and GAL/Court Visitor.

19 (d) **Developmental disabilities:** Completion of GAL Training and annual re-
20 certification since 2010. Personal experience of having a developmentally disabled sister,
21 for whom I served as Standby Guardian from February 27, 1992 through December 27,
22 1995. Familiarity with the capacities, incapacities, and needs of persons with
23 developmental disabilities as described in the GAL Handbook. Work experience first as
24 In-house Counsel for a professional guardianship organization with developmentally
25 disabled clients and as a guardianship attorney and GAL/Court Visitor.

26 (e) **Other areas relevant to the needs of individuals with a disability:**
27 Familiarity with and legal training in alternatives to guardianship. I have drafted health
28 care directives and durable powers of attorney for health care and finances, and mental
health advance directives, and am familiar with representative payeeship, the VA
fiduciary program, trusts, the informed consent statute, and supported decision-making. I
am familiar with services and resources provided by outside agencies to assist individuals
with a disability and their families.

1 **7. Legal procedure:** I am a licensed attorney and have had legal training and experience
2 with guardianship since 1992; first as a legal intern and later as an attorney for Lifetime
3 Advocacy Plus, a non-profit professional guardianship organization. I have drafted a wide range
4 of guardianship pleadings and have presented guardianship reports and accountings to Superior
5 Courts around the state. I have been in private practice since July 2010 and currently represent
6 professional and lay guardians, hospitals and long-term care facilities, and trustees in Thurston,
7 Mason, Lewis, Grays Harbor, and Kitsap Counties, as well as serving as Independent Counsel for
8 the Respondent in guardianship proceedings. I am a member of the State Pattern Forms
9 Sub-Committee for Probate and Guardianship. I served as the Chair of the Thurston County
10 Guardianship Roundtable, a professional association of judges, attorneys, guardians, and
11 guardians ad litem, from 2010 through August of 2018. I have served in the past as a member of
12 the Standing Committee for Title 11 GAL Training, and was a member of the WSBA Elder Law
13 Section's Legislative Committee from 2013 to 2015, which is responsible for reviewing and
14 responding to proposed guardianship legislation. I was a member of the WINGS Legislative
15 Committee from inception through July of 2016. I have presented and continue to present
16 Continuing Legal Education courses for various bar associations and volunteer legal services

1 organizations, and regularly give presentations on guardianship and conservatorship to members
2 of the public through various organizations and schools. Finally, I have attended numerous
3 Continuing Legal Education courses on guardianship, conservatorship, trust, and related areas of
4 law and continue to do so regularly.

5 **8. The requirements of Chapter 11.130 RCW:** I am familiar with the above statute
6 and related Title 11 statutes and have completed the Court Visitor training offered by the King
7 County Bar Association, Kitsap County Bar Association (presenter), and Tacoma-Pierce County
8 Bar Association (presenter), as well as presenting monthly training on the Uniform Guardianship
9 Act to the participants of the Thurston County Guardianship Roundtable in 2021.

10 **9. Settlement Guardian ad Litem/Trust Guardian ad Litem:** I am familiar with the
11 requirements of SPR 98.16W and statutes pertaining to wrongful death, survivor's actions, and
12 personal injury. I have had personal experience with SPR 98.16W in the context of
13 guardianships, which often result from disabilities to minors caused by the negligence of another
14 requiring settlements under SPR 98.16W and the construction of special needs trusts. I
15 completed the Settlement GAL Training offered by the King County Bar Association on October
16 25, 2011, and served as a Settlement Guardian ad Litem in several cases. In addition, I am
17 familiar with the requirements of RCW 11 as it pertains to trusts, and represent both professional
18 and lay trustees. Finally, I have served as a Trust Guardian ad Litem for the purpose of
19 reviewing trust accountings when there is no guardian and no valid virtual representative who
20 can represent the beneficiary's interests with respect to the accountings due to a conflict of
21 interest between the beneficiary and his or her parents. RCW 11.96A.120(4); *Anderson v.*
22 *Dussault*, 321 P.3d 1206 (2014).

23 **B.** I have never been removed for cause as a GAL/Court Visitor, nor have there ever been any
24 professional complaints, investigations, disciplinary actions, lawsuits, or professional liability
25 claims charged against me as a GAL/Court Visitor, including those involving allegations of
26 improper fee charges, fraud, theft, or other forms of dishonesty or professional malpractice.

27 **C.** Prior to my appointment, I have not had any contact regarding this case with any party to
28 the proceeding, nor is there any actual or apparent conflict of interest which would preclude me
from serving as Court Visitor in this particular case.

D. My regular hourly rate for Court Visitor work in a guardianship is \$275.00 per hour plus
costs, and for Trust GAL work is \$300.00 per hour plus costs; however, I do accept county pay
cases for those with assets under \$3,000.00, which are charged at the county pay rate.

E. In accordance with RCW 11.130, within three (3) days of the later of the actual service or
filing of this statement, any party may set a hearing to show cause why I should not be removed
for any of the reasons enumerated under that statute.

**I DECLARE UNDER PENALTY OF PERJURY UNDER THE LAWS OF THE STATE
OF WASHINGTON THAT THE FOREGOING IS TRUE AND CORRECT.**

Signed at Tumwater, Washington, this 6th day of June, 2024.

CARLSON-WHITLEY & LUTHER, LLP

ANGELA K. CARLSON-WHITLEY, WSBA #24186
Court Visitor

2024 COURT VISITOR/GUARDIAN TRAINING AGENDA



Hosted by: Community Guardians

Date: 5/7/2024

Time: 8:30-5:00

Location: Virtual via Zoom

8:30-8:45

Introduction

8:45-9:45

What makes a good investigator – Angela Carlson
Whitley & Deborah Jameson

15 Minute Break

10:00-11:00

Financial Exploitation/Abuse/Scams – Schon
Montague

15 Minute Break

11:15-12:15

Medicaid Applications and Rules – Sara McCulloch

Lunch

1:15 -1:45

View from the Bench – Lynn Fleischbein

1:45 – 2:45

Death with Dignity Act- Karen Griffith & Anna Du
Pen

15 Minute Break

3:00-4:00

Address Confidentiality- Rozlyn Finfrock

4:00-5:00

Washington Department of Financial
Institutions, Scams – Lyn Peters

Please mail check payments to:

Community Guardians PO Box
5779, Bremerton, WA 98312

Please Send all
Questions/Comments/

Info@cguardians.org

THE SUPERIOR COURT OF THE STATE OF WASHINGTON
FOR KITSAP COUNTY

614 DIVISION STREET, MS-24
PORT ORCHARD, WASHINGTON 98366
(360) 337-7140

JENNIFER A. FORBES, JUDGE
DEPARTMENT NO. 7
CADINE FERGUSON-BROWN, JUDGE
DEPARTMENT NO. 8

MATTHEW L. CLUCAS
COURT COMMISSIONER
LYNN K. FLEISCHBEIN
COURT COMMISSIONER
FRANK A. MAIOCCO, JR.
COURT ADMINISTRATOR

TINA ROBINSON, JUDGE
DEPARTMENT NO. 1
MICHELLE ADAMS, JUDGE
DEPARTMENT NO. 2
MELISSA A. HEMSTREET, JUDGE
DEPARTMENT NO. 3
WILLIAM C. HOUSER, JUDGE
DEPARTMENT NO. 4
JEFFREY P. BASSETT, JUDGE
DEPARTMENT NO. 5
KEVIN D. HULL, JUDGE
DEPARTMENT NO. 6

June 25, 2024

Ms. Angela K. Carlson-Whitley
Carlson-Whitley & Luther, LLP
222 Lee Street SW, Suite 112
Tumwater, WA 98501

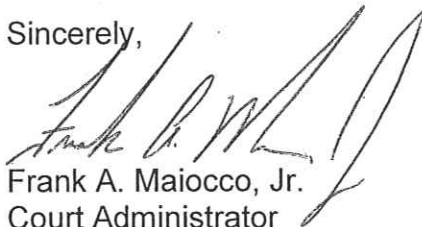
Re: Kitsap County Superior Court Title 11.130 Court Visitor Registry, 2024-2025

Dear Mr. Carlson-Whitley:

The Kitsap County Superior Court Guardian ad Litem/Court Visitor Committee has received and reviewed your application for the Title 11.130 Court Visitor registry. We are pleased to include you on the 2024 - 2025 Registry, effective July 1, 2024.

Thank you for your interest and participation in Kitsap County's Court Visitor program.

Sincerely,



Frank A. Maiocco, Jr.
Court Administrator
Kitsap County Superior Court