

Medina County Common Pleas Court

PROBATE AND JUVENILE DIVISIONS

93 PUBLIC SQUARE, ROOM 104, MEDINA, OHIO 44256

Kevin W. Dunn
Judge

MEDIA RELEASE

October 10, 2014

Medina County Probate Court Collaborates with First Merit Bank for Guardianship Training

Judge Dunn and Probate Court staff organize training sessions to help minimize time spent explaining policies and procedures of guardianship accounts



MEDINA – Six First Merit Bank managers from Seville, Lodi, Medina and Wadsworth locations attended the first guardianship training session with Judge Kevin Dunn and Probate Court staff October 8, 2014. The purpose of the training session was to increase education on best policies and practices regarding guardianships and trust accounts.

During the one-hour session, Judge Dunn, Court Administrator Sharon Danko, Probate Clerk Karen Sliwinski and Volunteer Guardianship Coordinator Nicki Shook spoke to the First Merit Bank managers about types of guardianships, letters of authority and the

difference between guardianships and power of attorney.

Judge Dunn said this training session was planned after First Merit Bank management voiced concerns to him regarding validation and enforcement on guardianship accounts.

In a guardianship or trust account, the bank helps the guardian set up to correct type of account for their ward. For minors, it is typically a restricted account where the juvenile cannot access the funds until the age of majority or without a specific court order. The Judge also explained to the managers that guardianship accounts always trump power of attorney orders.

“(The bank) is on the front line to notice if anything looks ‘fishy,’” Sliwinski said. “We never want our wards to be exploited and (the bank) can often spot this before we would.”

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Contact: Kristyn Soltis, 330.764.8751

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The bank also assists the Court when proof of assets, receipts and cancelled checks are required for the annual account, which is submitted to the Court for review and approval.

Sliwinski said the first training session helped everyone get on the same page with terms, processes and timing for Court requirements, as well as factoring in bank regulations that may put restrictions on guardians.

“Most of the issues relate to regular expenditures,” Sliwinski said. “Some banks say the guardian needs a specific Court order for each check, but in reality, they typically get approval for an annual budget worth of spending. As long as the Court has approved an expenditure, the guardian has the right to spend the ward’s funds.”

Judge Dunn said only managers came to the first session to see how beneficial the training would be for the bank’s time. Since the meeting was a success, Judge Dunn said there are plans to reach out to other bank managers and staff for training, even doing on-site trainings at the banks to minimize leaving facilities short staffed.

Danko said the intention of these training sessions isn’t to practice law, but to educate the bank on basic practices with the hope to cut down on questions or confusion in the future.

“I believe (the bank) now understands what we do more fully, as well as the obligations of the guardian,” Sliwinski said. “I think that through the training, we feel more like a team, rather than adversaries, with the goal of protecting the financial integrity of our wards.”