



**Conservator
Guardian Corporation**
OF MONTANA

Conservator and Guardian Corporation of Montana (CGCM) is a Montana corporation established to provide professional fiduciary and guardianship services. CGCM promotes quality of life and well-being for individuals whose life successes need support and guidance.

Our focus is people-centered and person-directed, identifying individuals' strengths and weaknesses and how to enhance a level of independence for them. Each person has the right to be treated with understanding and respect, the right for their wishes to be considered, and a right to be cared for.



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**Conservatorships
Guardianships
Durable Power of Attorney
Trusts**

CGCM Guiding Principles

CLIENT INTEREST

Because of the trust and faith our clients place in us, CGCM will act at all times for the sole benefit and interest of our clients when providing the highest standard of fiduciary services.

CLIENT DECISION-MAKING

CGCM strives to provide the maximum amount of control over decision-making to our clients.

HOLISTIC APPROACH

CGCM uses a holistic approach to providing fiduciary services and problem solving. CGCM will seek information from a wide number of resources before developing and implementing an agreed upon plan for fiduciary services.

CLIENT CONTROL

CGCM fiduciary services will be provided in the least restrictive method possible, in compliance with our principle to allow individual control over decision-making.

CONTACT US

✉ jmccrea@mtgenjustice.org

🌐 conservatorguardianmt.com

☎ (406) 422-3904



Planning & Care for those who matter most!

Self-determination should always be
an important part of conservatorships
and guardianships!

Purpose

The purpose of CGCM is to provide quality, flexible, client-centered guardianship and fiduciary services to Montanans who are vulnerable, in need of support and assistance, and unable to provide for their own needs

The array of comprehensive fiduciary and guardianship services includes:

- Durable Power of Attorney (DPOA)
- Court established Guardianships
- Court appointed Conservatorships
- Financial & Planning Services for people living in the community, assisted living facilities, and retirement communities
- Trusts, Revocable Living Trusts and Special Needs Trusts

Holistic & Comprehensive

CGCM works with other program partners to make available to its clients a wide array of wrap-around services to ensure all the client's needs are met in a timely and efficient manner.

Conservatorship

Referrals for conservatorships come from financial institutions, investment firms, family members, workers, human service organizations, and attorneys. CGCM will work with appropriate parties to gather information about the conservatee in order to make decisions for the conservatee that meet their expressed wishes, where known, as well as the best interests of the conservatee.



Guardianship

CGCM's mission is to preserve (secure) the quality of life and well-being of vulnerable adults. We provide trained guardians to oversee health care and responsibilities for each conservatee. All conservatees have the right to be treated with understanding and respect, the right to have their wishes considered, and the right to be well cared for.

Durable Power of Attorney

CGCM works with clients who do not have a trusted person available to serve in the role of Durable Power of Attorney (DPOA) agent for health care decisions, finances, or both. The program can help ensure the person's medical preferences are followed.

Revocable, Irrevocable and Special Needs Trusts

As trustee, CGCM manages the assets of the trust according to the instructions in the trust document. CGCM has a fiduciary obligation to manage the assets responsibly and according to the trust.

A close-up photograph of a hand holding a black, textured book. The words "FIDUCIARY DUTY" are printed in large, bold, yellow capital letters on the cover of the book. The background shows a wooden surface and a pen.