

ELDERCARE MEDIATOR QUESTIONNAIRE

A. BASIC INFORMATION:

LOCATION(S):

**"I WILL MEDIATE IN THE FOLLOWING LOCATION(S)":
LIST AT LEAST ONE STATE, THE STATE WHERE YOUR OFFICE IS LOCATED,
AND ANY ADDITIONAL STATES OR METROPOLITAN AREAS OUTSIDE OF
THE FIRST STATE LISTED. NOTE YOUR TRAVEL COSTS.**

Florida

YOUR NAME: Robert M. Morgan

BUSINESS NAME: Robert M. Morgan & Associates,
P.A.

ADDRESS: 12058 San Jose Blvd., Suite 501
Jacksonville, Florida 32223

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LANGUAGES SPOKEN FLUENTLY: English

FEES PER HOUR & OTHER FEES (EG. TRAVEL):

\$200.00 Flat Rate in Jacksonville Metropolitan Area and Adjacent Counties

DO YOU HAVE MEDIATOR MALPRACTICE INSURANCE? Yes

B. BACKGROUND:

OVERVIEW OF BACKGROUND

(PRIMARY PROFESSION, ETC. MAXIMUM 50 WORDS):

Elder law attorney with 25 years experience. Practice of law in all areas of elder law, including, Medicare and Medicaid planning, estates, wills, trusts, probates and guardianships. Former Certified Florida Supreme Court Certified Mediator. Member National and Florida Academies of Elder Law Attorneys, Florida, Tennessee and Washington State Bar Associations, Executive Committee of Florida Bar Elder Law Section.

GENERAL MEDIATION EXPERIENCE (MAX 30 WORDS):

Counsel families and caregivers in all areas of elder law and health and living issues. Former certified supreme court circuit court mediator.

NUMBER OF MEDIATED DISPUTES (ANY KIND--MINIMUM 5 TO BE LISTED):

over 10

NUMBER OF MEDIATED DISPUTES INVOLVING HIGH-CONFLICT FAMILY MEDIATION:

Over 10

ELDERCARE MEDIATION EXPERIENCE: NUMBER OF EM DISPUTES MEDIATED:

Less than 5

NUMBER OF YEARS YOU HAVE MEDIATED: 25

GERIATRIC EXPERIENCE (MAX 30 WORDS):

Help with placement and legal issues regarding the elderly, their families and caregivers.

OTHER:

25 years of experience as a counselor at law and as a certified circuit court mediator.

C.

EDUCATION, ASSOCIATIONS, AND LICENSES/MEDIATOR REGISTRIES:

EDUCATIONAL DEGREE(S), MAJOR(S), & INSTITUTION(S):

_DEGREES:

BS Business- Arizona State University (1982)

JD, With Distinction, Mississippi College School of Law (1985)

PROFESSIONAL ASSOCIATIONS:

Former Supreme Court Certified Circuit Court Mediator

National Academy of Elder Law Attorneys

Florida Academy of Elder Law Attorneys

MEDIATOR REGISTRIES/CERTIFICATION/LICENSES:

D.

**TYPES OF ELDERCARE MEDIATION DISPUTES THAT YOU WILL
MEDIATE:**

**CHECK ALL THAT APPLY & CHECK TYPES OF EM DISPUTES THAT YOU
HAVE ALREADY MEDIATED:**

WILL

HAVE

Quality of Life	Quality of Life
Housing	Housing
Car Keys, Driving & Transportation (limitations on driving, testing, transportation to medical appointments, friends, social events & church)	Car Keys, Driving & Transportation (limitations on driving, testing, transportation to medical appointments, friends, social events & church)
Care giving (division of duties, relief for caregivers, level of care needed, planning vacations for parents & caregivers)	Care giving (division of duties, relief for caregivers, level of care needed, planning vacations for parents & caregivers)
Financial Decisions	Financial Decisions
Wills, Trusts & Estates (planning, distribution of assets, & resolution of family disputes)	Wills, Trusts & Estates (planning, distribution of assets, & resolution of family disputes)
Powers of Attorney & Avoiding Guardianship	Powers of Attorney & Avoiding Guardianship
Health Care Decisions	Health Care Decisions
Emergency Decisions	Emergency Decisions
Planning Ahead for End of Life Decisions (funeral planning & Advanced Directives (Living Wills/Life Prolongation, organ donation preference, appointment of health care representatives)	Planning Ahead for End of Life Decisions (funeral planning & Advanced Directives (Living Wills/Life Prolongation, organ donation preference, appointment of health care representatives)
Other (List):	

**E.
MEDIATION TRAINING:**

**TRAINING IN BASIC MEDIATION (MINIMUM 40 HOURS OF GENERAL MEDIATION TRAINING):
NOTE TYPE (FAMILY, CIVIL, COMMUNITY MEDIATION OR OTHER, TITLE(S), TOTAL NUMBER OF HOURS, TRAINERS)**

have taken the 40 hour supreme court circuit civil mediation class

**TRAINING RECEIVED IN ELDERCARE MEDIATION:
NOTE TITLES, TOTAL NUMBER OF HOURS & TRAINERS (MAX 30 WORDS):**

TRAINING IN DOMESTIC VIOLENCE: NOTE TITLE(S), TOTAL NUMBER OF HOURS & TRAINERS (MAX 30 WORDS):

**SUMMARY OF OTHER ADVANCED MEDIATION TRAINING:
NOTE TITLE(S), TOTAL NUMBER OF HOURS & TRAINERS (MAX 30 WORDS):**

**WERE YOU A TRAINER FOR ANY NOTED ABOVE? Yes
IF SO, LIST HOURS:**

**F.
MODELS AND PROCEDURES USED AS A MEDIATOR:**

**MODEL(S) OF MEDIATION USED PRIMARILY:
FACILITATIVE**

**TYPE(S) OF MEDIATION SESSION USED (NOTE ALL YOU USE, THEN FOR EACH
CATEGORY, LIST YOUR LEVEL OF EXPERIENCE: LOW, MEDIUM, HIGH):**

EXPERIENCE	
HIGH	IN-PERSON ONLY
MEDIUM	WITH SOME PARTICIPATION BY CONFERENCE CALL
HIGH	MEDIATION BY CONFERENCE CALL
NONE	ONLINE DISPUTE RESOLUTION (MEDIATION WITH VIDEO COMPONENT)