

Life Care Planning Masterclass

with Maureen Rulison, BCPA, CMP, CDCP
& Friends



CAREGIVER SUPPORT
AND RESOURCES

Thank you for being part of our inaugural Life-Care Planning Masterclass, presented by Caregiver Support and Resources, LLC of Clearwater, FL. Led by Maureen Rulison, a Board-certified Patient Advocate and Certified Medicaid Planner and assisted by more than a dozen expert speakers serving the continuum of elder care.

In this masterclass you'll learn the four steps of life-care planning in Maureen's new book: "Because I Love You: My Book About Me." Our expert speakers each address their own professional insights. The steps are:

- ✓ **Step 1:** Let's Get to Know You
- ✓ **Step 2:** Tools for Living Your Best Life
- ✓ **Step 3:** Taking Care of those Who Take Care of Us.
- ✓ **Step 4:** Final Stages Planning

Now, let's meet our expert elder-care speakers!



www.caregiversupportandresources.com



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IN MEMORIAM

BRIAN LEBLANC: 1960-2025



A Powerful Voice for Dementia Care

This Life-Care Planning Masterclass is dedicated to the memory and legacy of Brian LeBlanc, whose voice, wisdom, and lived experience deeply shaped its creation. Brian, husband to Maureen Rulison, was a powerful advocate, speaker, and writer who spent his years living with Alzheimer's and vascular dementia educating others, breaking stigma, and reminding the world that purpose and dignity remain even as memory fades.

Brian passed shortly before the launch of this masterclass, which stands as their magnum opus — a labor of love, advocacy, and devotion. His voice still echoes in every lesson, every conversation, and every heartfelt step forward. This course is his legacy — and an invitation to honor those we love by planning with intention and care.

Together, Brian and Maureen were more than a care partner team — they were co-creators in a mission to bring compassion, clarity, and person-focused care to the forefront of elder care planning. Their shared work, rooted in love and lived experience, became the foundation for this masterclass. It is the realization of a vision they built side by side — one that places both care recipients and care partners at the center of planning.





Maureen Rulison

President & Founder
Caregiver Support and Resources,
LLC

Clearwater, FL

Maureen Rulison, BCPA, CMP, CDCP, is the founder of Caregiver Support & Resources, LLC, a person-focused life-care planning company established in 2004. Maureen is passionately dedicated to supporting individuals with dementia-related illnesses and their care partners. She draws from decades of experience and thousands of client cases, as well as her own personal caregiving journey with her life partner, Brian LeBlanc, who lived with Alzheimer's and vascular dementia.

CERTIFICATIONS & EXPERTISE

- ✓ Board-certified Patient Advocate
- ✓ Certified Medicaid Planner
- ✓ Certified Dementia Care Professional
- ✓ Co-Founder of #WeAreDementiaStrong



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MaureenRulisonpatientadvocate@gmail.com

Victoria Waller, Esq.

Owner & Attorney
Generations of Trust, Attorneys at
Law, PA

St. Pete Beach, FL



CERTIFICATIONS & EXPERTISE

- ✓ Stetson University College of Law
(Juris Doctorate, 2007)
- ✓ Florida Bar Exam (May 2008)
- ✓ Estate Planning
- ✓ Medicaid Eligibility
- ✓ Probate

Vickie Waller is the founder of Generations of Trust and a dedicated estate planning attorney. Vickie's lifelong passion for helping others—rooted in community service—drives her legal practice, where she specializes in guiding clients through estate planning, probate, and trust administration with compassion and personalized support. She actively serves organizations including the Tampa Bay Beaches Chamber of Commerce, Sunshine City Kiwanis, and the St. Pete Bar, embodying her belief that service and leadership go hand in hand.



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Lori Schellenberg, RN, CCM

Founder & Owner
Stepping Stone Advocacy Services

Tampa, FL

Lori Schellenberg is a seasoned healthcare professional and Patient Advocate with decades of diverse nursing experience, including roles as a staff nurse, home health nurse, occupational health nurse, workers' compensation case manager, and rehabilitation liaison. Her career has been defined by innovation, advocacy, and a deep commitment to improving care quality. Drawing from personal experiences supporting her parents through complex medical journeys, Lori helps families navigate the healthcare system with clarity and compassion.

CERTIFICATIONS & EXPERTISE

- ✓ Registered Nurse
- ✓ Certified Case Manager
- ✓ Patient Advocate
- ✓ Being Your Authentic Self
- ✓ Medical Record Clinical Reviewer
- ✓ Home Health Nurse



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*Stepping Stone
Advocacy Services*

Dean Landsman

Financial Advisor
Edward Jones

St. Petersburg, FL



CERTIFICATIONS & EXPERTISE

- ✓ Certified Financial Planner
- ✓ Chartered Financial Consultant
- ✓ Chartered Life Underwriter
- ✓ Accredited Asset Management Specialist
- ✓ MBA in Finance (University of Maryland)

Dean Landsman has over 30 years of experience in financial services. He holds an MBA in finance from the University of Maryland and several financial certifications dedicated to client success. Dean specializes in helping individuals and families simplify financial complexity, achieve life goals, and build meaningful legacies. He leads a dedicated team at Edward Jones offering personalized, holistic financial strategies rooted in strong client relationships.



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Michelle Daniel, NHA, MHA

President & CEO
The Eden Alternative

Rochester, NY

Michelle brings nearly three decades of experience in skilled nursing, assisted living, and ICF-IDD settings across multiple southern states. She has a Master's in Health Administration and advocates for person-directed care and culture change. Michelle joined The Eden Alternative in 2023 and is a sought-after speaker at national conferences such as The Pioneer Network and Green House Project. Formerly Vice President at Methodist Senior Services, she led philanthropic efforts and developed leadership programs. Michelle also serves on the United Methodist Association Board and lives in Mississippi with her family

CERTIFICATIONS & EXPERTISE

- ✓ Nursing Home Administration
- ✓ Masters in Healthcare Administration (University of Memphis)
- ✓ Eden Educator & Consultant
- ✓ Person-Focused Care
- ✓ Skilled Nursing



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THE
eden
ALTERNATIVE®

Linda Burhans

Caregiver Advocate & Radio Host

Owner

LindaBurhans.com

Seminole, FL



CERTIFICATIONS & EXPERTISE

- ✓ Support Group Facilitator
- ✓ Wellness and Self-care
- ✓ Radio Host
- ✓ Author
- ✓ National Speaker
- ✓ Care Partner Advocate

Linda Burhans is a caregiver advocate, speaker, and radio show host. Since beginning her caregiving journey in 2006, she has facilitated over 4,000 support groups, workshops, and speaking engagements across the country, providing practical tools, emotional support, and expert resources to thousands of caregivers. Through her weekly radio show Tips for Caregivers, as well as her blogs and outreach efforts, Linda empowers care partners to prioritize their well-being and reminds them that help is not only available — it's essential.



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 Linda
BURHANS

COACH - AUTHOR - SPEAKER - CAREGIVER ADVOCATE



Amie Parcinski

Director
Elder Well Adult Day Program

Clearwater, FL

Amie Parcinski is an entrepreneur and software engineer with over 20 years of experience across diverse industries. Her passion for senior care began while working in her father's medical office during college, where she saw firsthand the growing need for quality elder support. A Certified Dementia Specialist, Amie co-founded Elder-Well Adult Day in Clearwater with RN partner Jessica Menke, offering innovative adult day programming focused on aging in place. Their center provides unmatched daily therapies — including cognitive, sensory, and art-based activities — to enrich the lives of seniors and support their families.

CERTIFICATIONS & EXPERTISE

- ✓ Certified Dementia Specialist
- ✓ Respite Care
- ✓ Adult Day Program Management
- ✓ Aging in Place
- ✓ Cognitive, Sensory & Art Therapy
- ✓ Software Engineer



www.elderwelladulday.com



amie@elderwelladulday.com



Elder-Well[®]
Adult Day Program

Enrichment & Activity
Center for Seniors

Loretta Veney

Trained Facilitator, Author, Speaker

Owner

LorettaVeney.com

Clinton, MD



CERTIFICATIONS & EXPERTISE

- ✓ Certified LEGO Serious Play Facilitator
- ✓ Dementia Advocacy
- ✓ Maude Award Winner
- ✓ Author
- ✓ Featured in The Wall Street Journal, Washington Post, New York Times & PBS

Loretta Woodward Veney is an inspirational speaker and certified LEGO® Serious Play® facilitator with a focus on dementia advocacy and caregiver support. Following her mother's dementia diagnosis in 2006, Loretta became a nationally recognized educator and fierce advocate, blending innovation and compassion in her workshops and presentations. Loretta's creative use of LEGO® to connect with persons living with dementia won the Robin Roberts' Thrive Thursday and the 2023 Maude Award for innovation in dementia care. Her advocacy impacts audiences across the U.S. and Europe.

Loretta Veney Inspires!



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Chad Fisher

Founder, VP, Director of Business
Development & Community Liaison
Avail Home Care

Safety Harbor, FL

Chad Fisher is the founder of Avail Home Care, a leading concierge home care company serving the Tampa Bay area. A Florida native and U.S. Army veteran, After military service, he has dedicated his career to elder care. Chad has guided hundreds of families through home care decisions and long-term care planning. He is a respected educator on private long-term care insurance, payment options, and senior care resources. Chad also remains actively involved in his community through leadership roles with the Dunedin Rotary Club, Club-214, and the American Legion.

CERTIFICATIONS & EXPERTISE

- ✓ Private Duty Home Care
- ✓ Concierge Home Care
- ✓ Long-Term Care Planning
- ✓ Senior Care Resources
- ✓ Elder Care & Advocacy



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Barbara Proia

Owner

YOU. Organized by Barb

Tampa, FL



CERTIFICATIONS & EXPERTISE

- ✓ Professional Home Organizing
- ✓ Home Care Systems & Strategies
- ✓ Functional Living Spaces
- ✓ Care Partner Support
- ✓ Aging In Place
- ✓ Labor Relations (M.S. Michigan State University).

Barbara Proia is the owner of YOU. Organized By Barb, a professional home organizing service that helps individuals create sustainable systems and habits to reduce clutter and simplify life. With a background in psychology and a master's degree in labor relations from Michigan State University, Barb brings a thoughtful and strategic approach to her work. Her corporate experience, combined with a lifelong passion for organization, uniquely equips her to guide clients toward more peaceful, functional living spaces that support their overall well-being.



Tricia Sir Louis

Senior Placement Specialist

Tricia Sir Louis is a senior placement specialist with over 20 years of experience helping seniors and their families navigate the complexities of senior living. With a background in wellness and hands-on experience in assisted living, memory care, and healthcare settings, Tricia offers expert guidance and compassionate support through each stage of the transition process. Her insider knowledge of the senior care industry allow her to match families with the most appropriate care and living arrangements. Tricia is dedicated to ensuring every client receives the respect, dignity, and personalized care they deserve.

CERTIFICATIONS & EXPERTISE

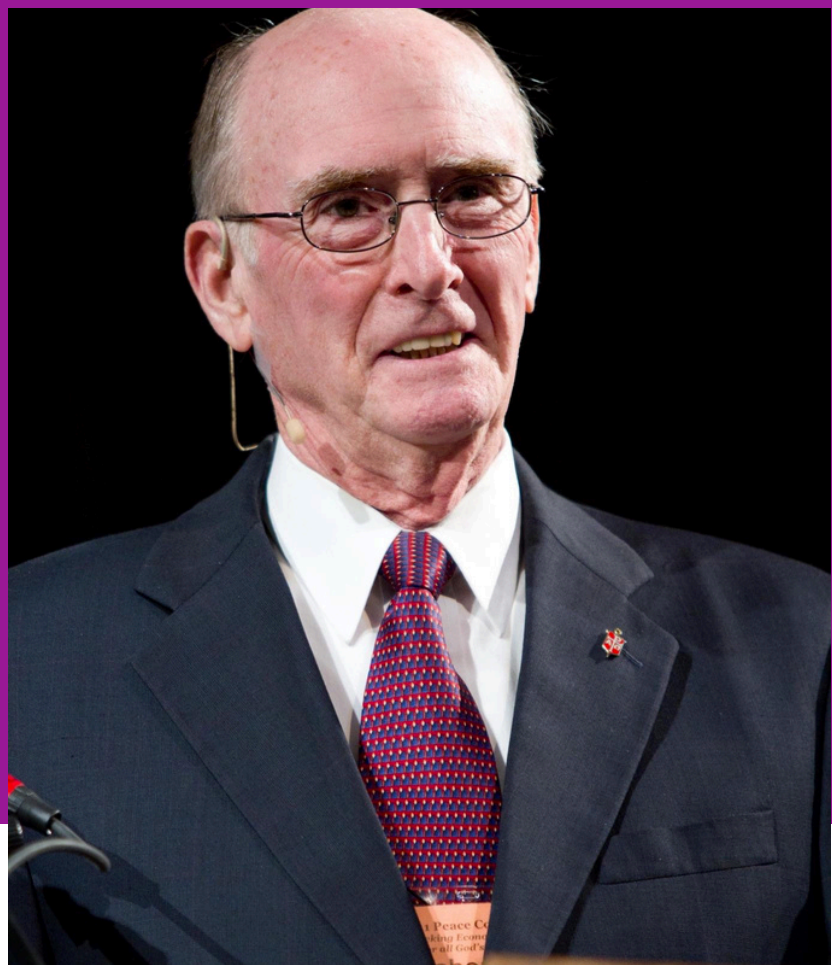
- ✓ Elder Living Transitions
- ✓ Assisted Living
- ✓ Memory Care
- ✓ Health Care Systems
- ✓ Care Strategy
- ✓ Personalized Care



Bishop Dr. Kenneth Carder

Professor Emeritus, Practice of
Christian Ministry
Duke Divinity School

Chapin, SC



CERTIFICATIONS & EXPERTISE

- ✓ Dementia-Inclusive Spirituality
- ✓ Author of “Ministry of the Forgotten: Dementia through a Spiritual Lens.”
- ✓ Theological & Pastoral Formation
- ✓ Dementia Writing
- ✓ Public Ministry

Bishop Kenneth L. Carder is the Ruth W. and A. Morris Williams Distinguished Professor Emeritus of at Duke Divinity School and a retired United Methodist bishop with over 50 years of service in ministry. He pastored churches across Eastern Tennessee and Southwest Virginia for more than three decades before being elected to the episcopacy in 1992. He later joined Duke’s faculty. An accomplished author, he continues to advocate for those on the margins — including individuals living with dementia — through his writing, teaching, and public ministry.



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Dr. Ashley Chance Fox

Transformation Coach & Owner
Balance Worthy

Dr. Ashley Chance Fox is a certified Transformation Coach specializing in helping individuals navigate life's emotional challenges with resilience and grace. Inspired by her personal journey as a caregiver for her father during his battle with cancer, Ashley has developed and applied powerful tools such as meditation, journaling, and Emotional Freedom Technique (EFT) to support healing and self-care. She empowers clients to reframe life's hardships as opportunities for growth and transformation. Through her compassionate and holistic approach, Ashley helps individuals find clarity, inner peace, and renewed strength.

CERTIFICATIONS & EXPERTISE

- ✓ Ph.D. in Education & Organizational Leadership
- ✓ Emotional Freedom Technique
- ✓ Care Partner Support
- ✓ Personal Growth & Transformation
- ✓ Finding Inner Peace



<https://balanceworthy.aweb.page/SelfCareforCaregivers>



<https://pages.balanceworthy.com>



ashley@balanceworthy.com



Ashley Chance Fox
TRANSFORMATIONAL COACH

Teresa Adams

Transformation Coach
Balance Worthy



CERTIFICATIONS & EXPERTISE

- ✓ Certified Wellness Professional
- ✓ Emotional Freedom Technique
- ✓ Yoga, Meditation & Balance
- ✓ Care Partner Support
- ✓ Self-Care

Teresa Adams is a certified wellness professional specializing in self-care, meditation, and Emotional Freedom Technique (EFT), with a focus on supporting caregivers through personal transformation. Drawing from her own experience caring for others and witnessing the toll caregiving took on her mother during her father's final years, Teresa found a renewed sense of purpose in helping individuals avoid caregiver burnout. Her professional expertise is rooted in helping care partners prioritize self-healing strategies while empowering others to reclaim their energy, identity, and joy.

 <https://balanceworthy.aweb.page/SelfCareforCaregivers>

 <https://teresaradams.com/transform-with-teresa>

 teresa.r.adams@sbcglobal.net



Lynn Principe

Death Doula, End of Life
Practitioner, Grief Coach
Dearly Beloved Life

Clearwater, FL

Lynn Principe provides compassionate support to individuals and families before, during, and after death. With a passion for reshaping how we view end-of-life, Lynn helps people explore what matters most in their final chapter to live more fully in the present. She serves as the Director of Education for the Florida End of Life Doula Alliance (FEOLDA), focusing on community-building and awareness, and is a frequent speaker and podcast guest. Based in Clearwater, FL, Lynn offers both in-person and nationwide remote services, and is the author of *Walking Me Home*, an end-of-life planning guide.

CERTIFICATIONS & EXPERTISE

- ✓ Master Grief Coach
- ✓ Funeral Celebrant
- ✓ Conscious Dying Educator
- ✓ Author
- ✓ End-of-Life Care Strategy



www.dearlybelovedlife.com



lynngoldenlife@gmail.com

lynn
PRINCIPE
DEARLY BELOVED LIFE

Brenda Roberts & National Council of Dementia Minds



DEMENTIA CARE & ADVOCACY

The National Council of Dementia Minds (NCDM) is the first national 501(c)(3) nonprofit founded and governed by persons living with dementia. Dedicated to fostering inclusion and empowerment, NCDM supports a national network of Dementia Minds groups—led by individuals with lived experience—who provide peer support, challenge stigma, and educate communities, care partners, healthcare professionals, and policymakers. With the mission to prove that life with dementia can still be rich in meaning and purpose, NCDM embraces all forms of cognitive impairment, including younger-onset dementias. Since its founding in 2019, NCDM has reached over 20,000 people across all 50 states and 14 countries with its free educational programming, grounded in the guiding belief: "Nothing about us without us."

