

OFFICE OF PUBLIC GUARDIAN

State of Iowa Professional Providers offering Substitute Decision Making Services

This is a list of professional providers that offer substitute decision making services throughout the state of Iowa. There may be other providers in addition to the ones in this list. This resource is for information only and not endorsed by the Office of Public Guardian or Iowa Department of Health and Human Services. We have attempted to gather information that may help guide you, but we encourage you to perform your own information gathering and interview process when selecting a provider.

Last updated February 2025. Information may have changed. We encourage you to reach out to the providers for the most up to date information.



CENTER FOR SIOUXLAND

Provider Name: Center for Siouxland

Email address of company: cfs@centerforsiouxland.org

Phone number: 712-252-1861

Fax number: 712-255-1352

Website: centerforsiouxland.org

Address: 715 Douglas Street, Sioux City, IA 51101

Contacts:

Jonette Spurlock

Jonette.spurlock@centersforsiouxland.org

Eligibility: Anyone

Services: Representative Payee and Conservatorship

Funding: Grants

Fees: Varies on the service provided

Service area: Northwest Iowa, Southeast South Dakota and Northeast Nebraska

Number of service providers: 2

Years in service: 49

Accepting new clients: Yes

Number of people served: 500+

CHILDREN AND FAMILIES OF IOWA PROTECTIVE PAYEE SERVICES

Provider Name: Children and Families of Iowa Protective Payee Services

Email address of company: tamim@cfiowa.org

Phone number: 515-697-7977

Fax number: 515-288-9109

Website: www.cfiowa.org

Address: 1111 University Avenue, Room F, Des Moines, IA 50314

Contacts:

Tami Masters, Protective Payee Services Manager

Eligibility: Clients can be referred by various agencies in the community, self-referred or court ordered

Services: Representative payee

Funding: A monthly fee is charged based on guidelines provided by the Social Security Administration. Clients within Polk County may qualify for funding assistance if they have services with Eyerly Ball, Broadlawns or Community Support Advocates

Fees: Set by the Social Security Administration (\$55 in 2025)

Service area: Polk County and surrounding counties within a 70-mile radius of Des Moines

Years in service: 20+

Accepting new clients: Yes

Number of people served: 325

DECISIONS FOR LIFE

Provider Name: Decisions for Life, LLC

Email address of company: info@d4lifeia.com

Phone number: 515-721-3395

Fax number: 515-414-7800

Website: www.d4lifeia.com

Address: PO Box 232, Altoona, IA 50009

Contacts:

1. Sherri McLerran, Owner
2. Allison Johnson, Office manager

Eligibility: Central Iowa resident over the age of 18

Services: Guardianship, conservatorship, representative payee, federal fiduciary (VA), healthcare agent/attorney-in-fact under a power of attorney, court visitor, trust protector, and fiduciary educational training.

Funding: Private pay, state or county contract

Fees: Range from \$45 to \$120 per hour

Service area: Central Iowa

Number of service providers: 3

Years in service: Decisions for Life was started in 2018. 30 years of experience in this line of work.

Certifications: Center for Guardianship Certification and National Certified Guardian

Accepting new clients: Currently at maximum capacity (December 2024)

Number of people served: 114

EXCEL ENTERPRISES, LLC

Provider Name: Excel Enterprises, LLC

Email address of company: laurie@excelenterprises.one

Phone number: 319-677-4278

Address: 308 E. Burlington St. #115, Iowa City, IA 52240

Website: None

Contacts:

Laurie Magaraci

319-677-4278

Eligibility: Adults and seniors in Iowa are accepted on a case-by-case basis. Call for more information on eligibility.

Services: Guardianship, conservatorship and care services

Funding: Private pay and county funding

Fees: \$95 per hour for guardianship or conservatorship cases. \$38 per hour for care services

Service area: state of Iowa

Number of service providers: 2

Years in service: 4 years of guardianship/conservatorship experience, 11 years in care services

Certifications: Center for Guardianship Certification (in process), Member of the National Guardianship Association and Guardianship Association of Iowa Network

Accepting new clients: Yes

Number of people served: 20

GUARDIANS OF NORTHEAST IOWA

Provider Name: Guardians of Northeast Iowa

Email address of company: info@guardiansofneia.org

Phone number: 563-419-2443

Fax number: 563-205-5372

Website: www.guardiansofneia.org

Address: PO Box 257, Decorah, Iowa 52101

Contacts:

- 1. Anna Stamat, Director**
712-898-9397
anna.stamat@guardiansofneia.org
- 2. Sherri Carolan, Director**
563-419-2443
sherri.carolan@guardiansofneia.org

Eligibility: Elderly and/or individuals with disabilities

Services: Guardianship, Conservatorship and Representative Payee Services

Funding: Office of Public Guardian, Iowa mental health regions and private pay

Fees:

Guardianship/Conservatorship \$150.00 per hour. \$.67 per mile plus drive time

Representative Payee - \$55.00 per month

Service area: Iowa

Number of service providers: 6

Years in service: 2018 - present

Certifications: Center for Guardianship Certification/National Certified Guardian. Case managers hold various individual certifications.

Licenses or training:

Anna Stamat: MS, Human Services; Sherri Carolan: BS, Finance/Economics

Case Managers with BS degrees in the areas of Psychology, Social Work, and Human Services

Accepting new clients: Yes

Number of people served: 223

HEARTLAND FIDUCIARY SERVICES

Provider Name: Heartland Fiduciary Services

Email address of company: erin@heartlandifd.com

Phone number: 319-321-6003

Fax number: 319-359-6980

Website: www.heartlandfid.com

Address: PO Box 5787, Coralville, IA 52241

Eligibility: No specific criteria. Contact agency for information.

Services: Guardianship, Conservatorship, Trusts, Estates, Agent under Power of Attorney

Funding: Private pay

Fees: \$150 per hour

Service area: Polk County metro area, Waterloo, Iowa City, Cedar Rapids, Davenport, Ottumwa and surrounding areas.

Number of service providers: 3 guardian case managers and 5 support staff

Years in service: 11

Certifications: All guardians are Nationally Certified Guardians

Licenses or training: 1 guardian case manager is a Certified Trust and Financial Associate (CTFA)

Accepting new clients: Yes

Number of people served: 200

HERA AND GRACE CARE MANAGEMENT

Provider Name: Sevana Dominguez

Email address of company: sevana@heragraccaremanagement.org

Phone number: 712-215-8323

Website: heragraccaremanagment.com

Address: 308 E Burlington St #236, Iowa City, IA 52240-1602

Services: Guardianship, conservatorships, private in-home care

Fees: Contact for more information.

Service area: Cedar Rapids and Iowa City area within 250 miles

Number of service providers: Currently 1 guardian and 4 caregivers

Years in service: 16 years of experience in health field

Certifications: CPR

Licenses or training: Completed relevant coursework and training in areas such as brain injury care, mandatory reporting, Hoyer lift operation, documentation, scheduling and payroll management. No licenses.

Accepting new clients: Yes

Number of people served: Currently 1

HORIZONS

Provider Name: Horizons

Email address of company: kblanchard@horizonsfamily.org

Phone number: 319-398-3943

Fax number: 319-398-3138

Website: <https://horizonsfamily.org/>

Address: 819 5th Street SE, Cedar Rapids, IA 52406

Contacts:

Kyle Blanchard

319-375-3138

kblanchard@horizonsfamily.org

Services: Representative payee

Funding: Client fees

Fees: \$55 per month

Service area: Approximately 75 miles outside of Cedar Rapids

Number of service providers: 2

Years in service: 8

Certifications: HUD Certified Housing Counselors

Licenses or training: HUD Certified Housing Counselor Certificate

Accepting new clients: Yes

Number of people served: Approximately 150

MUSCATINE COUNTY COMMUNITY SERVICES

Provider Name: Muscatine County Community Services

Email address of company: Jessica.bopes@muscatinecountyiowa.gov

Phone number: 563-263-7512

Fax number: 563-272-0959

Website: <https://www.muscatinecountyiowa.gov/208/Community-Services>

Address: 315 Iowa Avenue Ste. 1, Muscatine, IA 52761

Contacts:

- 1. Jessica Bopes, Director**
Jessica.bopes@muscatinecountyiowa.gov
- 2. Ashley Curtis, Trust Worker**
ashley.curtis@muscatinecountyiowa.gov
- 3. Kate Froelich, Trust Worker**
kate.froelich@muscatinecountyiowa.gov
- 4. Emma Martin, GA/Trust Worker**
emma.martin@muscatinecountyiowa.gov
- 5. Lisa Wolf, Trust Worker**
lisa.wolf@muscatinecountyiowa.gov

Eligibility: Muscatine County resident

Services: Guardianship, Conservatorship, Representative Payee

Funding: Muscatine County funding

Fees: \$41 per month trust fee. Can be waived if inability to pay.

Service area: Muscatine County

Years in service: 40+

Licenses or training: All trust staff must have a minimum of a bachelor's degree. Annual ongoing training.

Accepting new clients: Yes

Number of people served: 200



PAYEE SERVICES AND SOLUTIONS

Provider Name: Payee Services and Solutions

Email address of company: jacob@payeesands.org

Phone number: 319-358-5733

Fax number: 319-800-6093

Website: payeesands.org

Address: PO Box 2052, Iowa City IA 52244

Eligibility: Anyone receiving Social Security or VA benefits

Services: Representative Payee (Social Security and Railroad Retirement Board) and VA Fiduciary

Funding: Client fees

Fees: Set by Social Security Administration

Service area: Eastern Iowa

Years in service: 21

Certifications: Authorized by Social Security Administration

Accepting new clients: Yes

Number of people served: 210

PERMANENT PLANNING, INC

Provider Name: Permanent Planning, Inc. (PPI)

Email address of company: ppi@episervice.org

Phone number: 319-277-1410

Fax number: 319-277-1359

Website: permanentplanning.org

Address: 4901 University Ave., Ste. D, Cedar Falls, IA 50613

Contacts:

1. Lori DeVries, Program Coordinator

319-277-1410

Lori.devries@episervice.org

2. Ian Kendrick, Guardian Representative

319-277-1410

Ian.kendrick@episervice.org

Eligibility: PPI serves people with intellectual disabilities and older adults with guardianship or medical advocacy needs

Services: Guardianship and medical advocacy services

Funding: Private pay. There is no public funding for PPI's services.

Fees: \$75.00 per hour for guardianship services, medical advocacy services, and travel time outside Black Hawk County, Iowa. Mileage will be charged at the current federal mileage reimbursement rate.

Service area: PPI staff will travel up to a 125-mile radius of Cedar Falls

Number of service providers: 2 full time guardians

Years in service: Since 1973

Certifications: Lori DeVries is a National Certified Guardian, certified through the Center for Guardianship Certification in 1999, renewing her certification every 2 years.

Licenses or training: Lori DeVries has been an Iowa Licensed Bachelor Level Social Worker since 1999. She has 28 years of experience providing guardianship and advocacy services and has worked with people with disabilities for 36 years. Ian Kendrick is a licensed EMT and has worked in the medical field for the past 10 years.

Accepting new clients: Yes

Number of people served: Currently serving as guardian for 35 individuals

PREMIER PAYEE

Provider Name: Premier Payee, Inc.

Email address of company: penny@premierpayee.org

Phone number: 515-274-9837

Fax number: 515-777-1053

Website: www.premierpayee.org

Address: 100 E. Euclid Ave., Ste. 103, Des Moines, IA 50313

Contacts:

Kathy Wilson

515-274-9837 ext. 204

kathy@premierpayee.org

Eligibility: No specific requirements

Services: Representative payee services for those receiving Social Security, VA benefits or Railroad benefits. Bill payer services for anyone requiring the service.

Funding: Beneficiary is responsible for private pay, unless other approved funding is secured by the beneficiary.

Fees:

2025 fees for Social Security \$55 per month, 2025 fees for VA 4% of the total monthly VA benefit amount, 2025 fees for Railroad at TBD, bill pay services \$103 per month

Service area:

- For Social Security beneficiaries – Polk, Boone, Story, Marshall, Jasper, Marion, Warren, Madison and Dallas
- VA beneficiaries, Railroad beneficiaries and bill pay services – across the United States

Number of service providers: 2

Years in service: 13

Certifications: Audited annually by Social Security Administration and the VA

Licenses or training: Member of American Representative Payee Organization which provides various training opportunities. Attend trainings offered by Social Security Administration and VA

Accepting new clients: Yes

Number of people served: 211+

SYSTEMS UNLIMITED

Provider Name: Systems Unlimited

Email address of company: payeeservices@sui.org

Phone number: 319-248-1021

Fax number: 319-341-9443

Website: sui.org

Address: 2533 Scott Blvd. SE, Iowa City, IA 52240

Contacts:

Elizabeth McDade

319-248-1021

payeeservices@sui.org

Eligibility: Clients in services at SUI waiver homes and community clients

Services: Representative payee

Fees: \$55 per month

Service area: Coralville, Iowa City, Marion, Cedar Rapids, and smaller communities including Monticello, Tipton, Muscatine, Washington and Williamsburg.

Accepting new clients: Yes

Number of people served: 340

TOTAL PAYEE SERVICES

Provider Name: Total Payee Services

Email address of company: kwitten@totalpayee.com

Phone number: 319-862-1582

Fax number: 319-862-1586

Website: www.totalpayee.com

Address: 1660 42nd Street NE, Ste. O, Cedar Rapids, IA 52402

Contacts:

- 1. Kacy Witten**
319-862-1582 ext. 105
kwitten@tfsolutionsgroup.com
- 2. Kellie Hoffman**
319-862-1582 ext. 104
khoffman@tfsolutionsgroup.com
- 3. Christie Netolicky**
319-862-1582 ext. 102
cnetolicky@tfsolutionsgroup.com

Eligibility: Social Security and veterans benefits recipients

Services: Social Security representative payee and VA fiduciary

Funding: Non-profit

Fees: limited to amounts set by Social Security and the Department of Veterans Affairs

Service area: Linn County and surrounding areas

Number of service providers: 3

Years in service: 13

Certifications: AFCPE

Licenses or training: SOAR training

Accepting new clients: Yes

Number of people served: 500+



TRANSITIONAL LIFE CONSULTING

Provider Name: Transitional Life Consulting, LLC

Email address of company: kimw@transitionallifeconsulting.com

Phone number: 515-650-0922

Website: <https://www.transitionallifeconsulting.com/>

Address: 2357 80th Avenue, Norwalk, IA 50211

Contacts:

Kim Walker

515-650-0922

kimw@transitionallifeconsulting.com

Services: Guardianship, conservatorship, care management

Funding: Private pay

Fees: \$100 per hour billed in 6-minute increments

Service area: Polk and surrounding counties

Number of service providers: 1

Years in service: 13

Certifications: Center for Guardianship Certification/National Certified Guardian, Certified Senior Advisors

Accepting new clients: Yes

Number of people served: 13

UNITED ADVOCACY SERVICES

Provider Name: United Advocacy Services

Email address of company: lynn@unitedadvocacyservices.com

Phone number: 515-382-3733

Fax number: 515-686-6032

Website: <http://www.unitedadvocacyservices.com/Welcome.html>

Address: Box 571, Nevada, IA 50201

Eligibility: Call for information

Services: Guardianship, conservatorship, VA fiduciary, bill payer, medical advocacy, healthcare agent/attorney-in-fact

Funding: Private pay

Fees: It depends on the services provided. Contact for more information.

Service area: Primarily central Iowa

Number of service providers: 1

Years in service: 17

Accepting new clients: There is a waiting list for services.

Number of people served: 40+