

## 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@heragracecaremanagement.org

**Phone number:** 712-215-8323

**Website:** heragracecaremanagment.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 5<sup>th</sup> 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](mailto:payeeservices@sui.org)

**Phone number:** 319-248-1021

**Fax number:** 319-341-9443

**Website:** [sui.org](http://sui.org)

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

**Contacts:**

**Elizabeth McDade**

319-248-1021

[payeeservices@sui.org](mailto: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 80<sup>th</sup> 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+