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## **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. While the department attempted to gather information that may help start your search, you are strongly encouraged to gather your own information, ask questions, and interview any potential provider.

Last updated January 2026. 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](mailto:cfs@centerforsiouxland.org)

**Phone number:** 712-252-1861

**Fax number:** 712-255-1352

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

**Address:** 715 Douglas Street, Sioux City, IA 51101

**Contacts:** Jonette Spurlock ([jonette.spurlock@centerforsiouxland.org](mailto:jonette.spurlock@centerforsiouxland.org))

**Eligibility:** Anyone

**Services:** Representative payee and conservatorship

**Funding:** Grants

**Fees:** Varies on the service provided

**Service area:** Northwest Iowa

**Number of service providers:** 3

**Years in service:** 50

**Accepting new clients:** Yes

**Number of people served:** 400



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## CHILDREN AND FAMILIES OF IOWA PROTECTIVE PAYEE SERVICES

**Provider name:** Children and Families of Iowa

**Email address of company:** [frontdesk@cfiowa.org](mailto:frontdesk@cfiowa.org)

**Phone number:** 515-288-1981

**Fax number:** 515-288-9109

**Website:** [www.cfiowa.org](http://www.cfiowa.org)

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

**Contacts:** Tami Masters, Protective Payee Services Manager ([tamim@cfiowa.org](mailto:tamim@cfiowa.org)) 515-697-7977

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

**Services:** Protective payee services

**Fees:** Set by the Social Security Administration

**Service area:** 70-mile radius of Des Moines

**Years in service:** 20+

**Accepting new clients:** Yes

**Number of people served:** 352

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## 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:**

- Sherri McLerran, Owner
- 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 or state contract

**Fees:** Range from \$45 to \$175 per hour

**Service area:** Central Iowa

**Number of service providers:** 3

**Years in service:** Decisions for Life was started in 2018, but 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

**Number of people served:** 114

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## 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

**Contacts:** Laurie Magaraci

**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:** \$110 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:** 5 years of guardianship/conservatorship experience, 12 years in care services

**Certifications:** Member of National Guardianship Association and Guardianship Association of Iowa Network

**Accepting new clients:** Yes

**Number of people served:** 20

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## 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:**

- Jackie Duden, Director (director@guardiansofneia.org) 712-898-9397
- Shelly Ostern, Accounting Assistant (info@guardiansofneia.org) 563-419-2443

**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 per hour and \$.70 per mile plus drive time.  
Representative payee \$55 per month

**Service area:** State of Iowa for guardianship services. Within 75 miles of Decorah for representative payee services

**Number of service providers:** 6

**Years in service:** 2016-present

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

**Licenses or training:** Jackie Duden – Licensed Master Social Worker. Case managers – hold Bachelor of Science degrees in Psychology, Social Work and Human Services.

**Accepting new clients:** Yes

**Number of people served:** 223



## HERA AND GRACE CARE MANAGEMENT

**Provider name:** Hera & Grace Care Management, LLC

**Email address of company:** [sevana@heragraccaremanagement.org](mailto:sevana@heragraccaremanagement.org)

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

**Fax number:** 319-354-4632 (Attn: Hera Grace Care Management LLC mailbox #236)

**Website:** [www.heragraccaremanagement.com](http://www.heragraccaremanagement.com)

**Address:** 308 E Burlington St. #236, Iowa City, IA 52240

**Contacts:** Sevana Dominguez

**Eligibility:** Case by case basis

**Services:** Guardianship, conservatorship, assistance with finding private pay caregivers or home health agencies, care management

**Funding:** Private pay or Social Security

**Fees:** Discussed during the initial assessment. Fees can be reduced when needed to ensure access to appropriate care. Guardianship fees are typically \$75-\$110 per hour.

**Service area:** Cedar Rapids/Iowa City area – within 300-mile radius

**Number of service providers:** 1

**Years in service:** 1

**Licenses or training:** Over 16 years of healthcare experience including in-home care and facility-based support, medical billing and administrative healthcare services, intellectual disability support in group homes, elder care, young adult care and children's services

**Accepting new clients:** Yes

**Number of people served:** Three clients within the first year of operation. Caseloads are intentionally kept small to ensure exceptional support, personalized attention and responsive care. Willing to take on 25 clients max.

## **HORIZONS**

**Provider name:** Horizons

**Email address of company:** info@horizonsfamily.org

**Phone number:** 319-398-3943

**Fax number:** 319-398-3577

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

**Address:** 819 5<sup>th</sup> Street SE, Cedar Rapids, IA 52401

**Contacts:** Emily Carr, Rep Payee (ecarr@horizonsfamily.org) 319-398-3943 ext. 2011

**Eligibility:** Must be required by Social Security to need a representative payee

**Services:** Representative payee services, budgeting assistance, assistance with completing SNAP and Medicaid reviews

**Funding:** Client fees

**Fees:** \$57 per month, subject to annual cost of living adjustments

**Service area:** Up to 75 miles outside of Cedar Rapids

**Number of service providers:** 1

**Years in service:** 10

**Certifications:** HUD Certified Housing Counselor

**Accepting new clients:** Yes

**Number of people served:** Approximately 150

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## KW FIDUCIARIES

**Provider name:** KW Fiduciaries

**Email address of company:** info@kwfiduciaries.com

**Phone number:** 309-225-3345

**Website:** www.kwfiduciaries.com

**Address:** 205 S Barrington Dr., Hampton, IL 61256

**Contacts:** Kelly Windquist (kwinquist@kwfiduciaries.com)

**Services:** Trustee, successor trustee, executor of will, agent under a financial power of attorney, agent under a healthcare power of attorney if also serving as agent under the financial power of attorney, guardian, conservator, and offering fractional Chief Financial Officer services for small businesses and nonprofits at www.kwconsulting.llc

**Funding:** Private pay

**Fees:** \$1,000 intake fee for trustee, successor trustee, executor of a will; \$175/hour

**Service area:** Quad cities, Iowa and Illinois

**Years in service:** 1

**Licenses or training:** Master of Business Administration from Tuck School of Business at Dartmouth College and Master of Public Administration from Harvard Kennedy School of Government

**Accepting new clients:** Yes

**Number of people served:** 5



## 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:** www.muscatinecountyiowa.gov

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

### **Contacts:**

- Jessica Bopes, Director (jessica.bopes@muscatinecountyiowa.gov)
- Ashley Curtis, Trust Worker (ashley.curtis@muscatinecountyiowa.gov)
- Kate Froelich, Trust Worker (kate.froelich@muscatinecountyiowa.gov)
- Emma Martin, GA/Trust Worker (emma.martin@muscatinecountyiowa.gov)
- Lisa Wolf, Trust Worker (lisa.wolf@muscatinecountyiowa.gov)

**Eligibility:** Must be a resident of Muscatine County

**Services:** Guardianship, conservatorship and representative payee

**Funding:** Muscatine County funding

**Fees:** Representative payee fee allowed by Social Security, and yearly guardian and conservator fees as appropriate

**Service area:** Muscatine County, and clients that are living in group homes, nursing homes or other care facilities outside of Muscatine County

**Years in service:** 40+

**Accepting new clients:** Yes

**Number of people served:** 220



## **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:** www.payeesands.org

**Address:** PO Box 2052, Iowa City, IA 52244

**Contacts:** Jacob Henry

**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:** 22

**Accepting new clients:** Yes

**Number of people served:** 225

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## 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:**

- Lori DeVries, Program Coordinator
- Ian Kendrick, Guardian Representative

**Eligibility:** PPI serves adults in need of guardianship. PPI must believe they can make a positive difference in the adult's life, and the adult must have the ability to pay PPI fees.

**Services:** Corporate guardianship and medical advocacy services

**Funding:** Self pay only

**Fees:** \$100 per hour. Hourly rate and mileage at the current state rate will be charged for those living outside of Black Hawk County.

**Service area:** Reasonable distance from Cedar Falls/Waterloo, Iowa. Willing to travel as appropriate to provide services.

**Number of service providers:** 2

**Years in service:** Since 1973

**Certifications:** Lori DeVries is a National Certified Guardian, certified through the Center for Guardianship Certification

**Licenses or training:** Lori DeVries is a licensed bachelor level social worker in the state of Iowa

**Accepting new clients:** Yes

**Number of people served:** Currently serving 30



## 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., Suite 103, Des Moines, IA 50313

**Contacts:** Kathy Wilson (kathy@premierpayee.org) 515-274-9837 ext. 204

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

**Funding:** Private pay unless other approved funding is secured by the beneficiary

**Fees:** 2026 fees for Social Security (\$57 per month), 2026 fees for VA (4% of the total monthly VA benefit amount), 2026 fees for Railroad (TBD), bill pay services (\$106 per month)

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

**Number of service providers:** 2

**Years in service:** 14

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

**Eligibility:** Clients in services at SUI wavier 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



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## THE DIGNITY BLUEPRINT

**Provider name:** The Dignity Blueprint

**Email address of company:** admin@thedignityblueprint.com

**Phone number:** 712-370-2400

**Address:** PO Box 72, College Springs, IA 51637

**Contacts:** Morgan Esque

**Eligibility:** Adults who require a court appointed guardian or conservator. Eligibility is determined on a case-by-case basis.

**Services:** Guardianship, conservatorship, care coordination and supportive caregiving services

**Funding:** Private pay or county funded referrals depending on the referral source and court order

**Fees:** Rates differ for guardianship, conservatorship, caregiving and travel time. Please call or email to discuss. Mileage is billed at the current federal rate.

**Service area:** State of Iowa, with priority given to Southwest Iowa

**Number of service providers:** 3 plus additional support staff

**Years in service:** 2025-present

**Certifications:** The team includes a registered nurse, staff with medication management certification and a notary public. Additional education includes a Master of Healthcare Administration and a bachelor's degree in psychology.

**Licenses or training:** Mandatory reporting, HIPAA, traumatic brain injury, dementia and Alzheimer's care, crisis intervention, medication management, trauma-informed care, person-centered planning, and supported decision making. Team experience includes nursing, social services, behavioral health, Medicaid programs, disability services and financial management.

**Accepting new clients:** Yes

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## 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

**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:** 14

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

**Accepting new clients:** Yes

**Number of people served:** 13



## **TRIUMPHANT LIVING IOWA**

**Provider name:** Triumphant Living

**Email address of company:** info@triumphantlivingiowa.com

**Phone number:** 319-277-7664

**Website:** <https://triumphantlivingiowa.com>

**Address:** 3429 Midway Dr., Cedar Falls, IA 50613

**Contacts:** Suzana Sumar

**Services:** Guardianship, conservatorship, agent under power of attorney, trusts

**Fees:** Varies per service

**Service area:** State of Iowa

**Number of service providers:** 2

**Years in service:** 5

**Accepting new clients:** Yes