

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

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

Number of service providers: 3

Years in service: 50

Accepting new clients: Yes

Number of people served: 400

CHILDREN AND FAMILIES OF IOWA PROTECTIVE PAYEE SERVICES

Provider Name: Children and Families of Iowa

Email address of company: frontdesk@cfiowa.org

Phone number: 515-288-1981

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

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 (\$57 in 2026)

Service area: 70-mile radius of Des Moines

Years in service: 20+

Accepting new clients: Yes

Number of people served: 352

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 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

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
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: \$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



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. **Jackie Duden, Director**
712-898-9397
director@guardiansofneia.org
2. **Shelley Ostern, Accounting Assistant**
563-419-2443
info@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. \$.70 per mile plus

drive time Representative Payee - \$55.00 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 the areas of 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@heragracecaremanagement.org

Phone number: 712-215-8323

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

Website: www.heragracecaremanagment.com

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

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 5th Street SE, Cedar Rapids, IA 52401

Contacts:

Emily Carr, Rep Payee

319-398-3943 ext. 2011

ecarr@horizonsfamily.org

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 full time representative payee

Years in service: 10

Certifications: HUD Certified Housing Counselor

Accepting new clients: Yes

Number of people served: Approximately 150

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: muscatinecountyiowa.gov

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: Must be a resident of Muscatine County

Services: Guardianship, conservatorship, 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 those clients that are living in group homes, nursing homes, or other care facilities outside of Muscatine County

Years in service: 40+

Licenses or training: Yearly ongoing training

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: payeesands.org

Address: PO Box 2052, Iowa City IA 52244

Contacts:

Jacob Henry

319-358-5733

jacob@payeesands.org

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

Certifications: Authorized as an organizational payee by Social Security

Accepting new clients: Yes

Number of people served: 225

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**
2. **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: \$100.00 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., 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: 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
- VA beneficiaries, Railroad beneficiaries and bill pay services – across the United States

Number of service providers: 2

Years in service: 14

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

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

712-370-2400

admin@thedignityblueprint.com

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: The 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



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: 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

319-277-7664

suzana@triumphantlivingiowa.com

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