

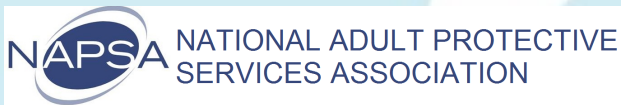


World Elder Abuse Awareness Day Fourth GLOBAL Summit **Empowering People at Every Level: Every Age, Every Stage**

13th Anniversary | Tuesday, June 5, 2018 | Washington, DC

Securities and Exchange Commission | 100 F Street, NE, Washington, DC

CONVENING ORGANIZATIONS



LEAD SPONSORS

JPMorgan Chase Foundation



Welcome

June 5, 2018

Dear WEAAD Attendees:

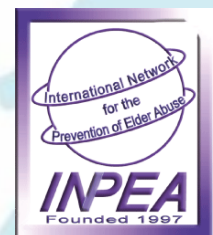
On behalf of the National Adult Protective Services Association, National Center for Victims of Crime and International Network for the Prevention of Elder Abuse, welcome to the Fourth Global Summit in celebration of the 13th anniversary of World Elder Abuse Awareness Day.

Our deepest gratitude also goes to our esteemed group of national and international speakers, who are true pioneers and champions for elder justice, as well as our many partner organizations.

This event would not have been possible without the generous support from our sponsors — JPMorgan Chase Foundation, SIFMA, EverSafe, Western Union, and Wells Fargo Advisors. Thank you to Jay Clayton, Chair of the U.S. Securities and Exchange Commission, and his incredible staff for hosting the Global Summit.

FACTS ABOUT ELDER ABUSE

- Elder abuse is a rampant, largely invisible, expensive, and lethal problem
- One in ten older persons is a victim of elder abuse
- Older abuse victims are three times more likely to die than non-victimized older persons
- Elder abuse costs victims, their families, financial institutions, and taxpayers tens of billions of dollars a year
- Older adults and younger adults with disabilities are the only victims of crime and abuse which receive no designated support for protective and other victim services from the U.S. government



“What WEAAD 2018 is: the driving force of a caring culture where we celebrate and respect older persons and their human rights. There is a need for extraordinary leadership, clarity of vision, and complete commitment in knowing that in a civil society, each person can and must resolve to do better, be stronger, to reach further, to find solutions.”

**-Dr. Elizabeth Podnieks,
Founder of WEAAD**

MORNING AGENDA

Continental Breakfast

8:30 AM

Elder Justice Coordinating Council Meeting

9:30 AM

Lunch (On Your Own)

11:30 AM

AFTERNOON AGENDA

Welcome and Opening Remarks

1:00 PM



Betty Malks, WEAAD Chairperson



Elizabeth Podnieks, PhD, WEAAD Founder

Can Data Sharing Improve the Financial Health of Older Adults?

1:15 PM



Larry Santucci, *Senior Industry Specialist, Consumer Finance Institute, Federal Reserve Bank of Philadelphia; Co-leader, National Financial Independence Project*

The presentation will cover how data sharing between financial institutions—prohibited under current data privacy laws—could help to mitigate elder financial fraud and abuse.

Global Journeys in Elder Justice

2:15 PM



Karen Buck, Esq., *Executive Director, SeniorLAW Center, Philadelphia, PA*

Karen Buck traveled through Iceland, Japan, New Zealand and Australia—several of the top countries for aging well—to meet with leaders in law, aging and government (and older people themselves) to learn and share best practices for protecting elder rights. She will share lessons learned and more about her work as a public interest attorney and nonprofit leader in elder justice.

AFTERNOON AGENDA

Canadian Initiatives to Address Elder Financial Abuse

3:00 PM



Marian Passmore, *Director of Policy and COO, Canadian Foundation for Advancement of Investor Rights, Toronto, Ontario*

Marian Passmore will present an overview of various initiatives Underway in Canada to address elder financial abuse, including a summary of a consultations, findings and recommendations from a joint report by FAIR Canada and the Canadian Centre for Elder Law, “Report on Vulnerable Investors: Elder Abuse, Financial Exploitation, Undue Influence and Diminished Mental Capacity.”

Media Awards

3:45 PM

Liz Loewy, *General Counsel and Senior VP Of Industry Relations, EverSafe*

Kathleen Quinn, *Senior Advisor, NAPSA*

Impact Elder Justice Action Plan

4:00 PM

Betty Malks, *WEAAD Chairperson*

Lisa Bleier, *Managing Director and Associate General Counsel, SIFMA*

Q & A (From Live and Virtual Audience)

4:15 PM

Closing Remarks

4:25 PM

Adjourn

4:30 PM

WEAAD Reception

5:00 to
7:00 PM

*United States Capitol
First Street NE
SVC Room 209*



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COMMITMENT TO COMMUNITY

We proudly support the National Adult Protective Services Association and applaud their positive impact on protecting our elder community nationwide.



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SENIOR INVESTOR PROTECTION – SIFMA VIEWS AND ACTION

More than half of older Americans utilize financial advisors, and SIFMA is committed to finding solutions that help those advisors protect their senior investors from exploitation and fraudulent practices. SIFMA has been working with industry members, academics, and state and federal lawmakers to advance policies, practices, rules, regulations, and laws to enhance senior investor protections.

SIFMA'S SENIOR INVESTOR ADVOCACY PLAN



ADVANCE

state legislation that strengthens senior investor protection



PROMOTE

federal legislation to provide firms with additional resources



ADVOCATE

for federal guidance from regulatory agencies



SECURE

increased funding to prevent financial abuse



COLLABORATE

with scientific and academic experts



CONVENE

industry, scientific and academic experts at SIFMA's Senior Investor Protection events

Event Partners

INTERNATIONAL

Alzheimer's Disease International
Association of Jewish Aging Services
International Association for Indigenous Aging
The Global Ageing Network
The Franchise Consulting Company

NATIONAL

ABA Foundation
American Bankers Association Foundation
ASPIRE-211, Inc.
Beyond Brooke
Canadian Network for the Prevention of Elder Abuse
Center for Advocacy for the Rights and Interests of the Elderly (CARIE)
Center for Medicare ADvocacy
Elder Justice Coalition
elderjustice.gov
EverSafe
Gulf Coast Elder Abuse Conference
Health Benefits ABCs
HelpAge USA
Jewish Coalition Against Domestic Abuse
JPMorgan Chase
Justice Solutions
JUMP Technology Services
Leading Age
MyCareMatch.com
National American Securities Administrators Assn
National Asian Pacific Center on Aging
National Association of Area Agencies on Aging
National Association of Social Workers (NASW)
National Center on Elder Abuse (NCEA)
National Consumer Voice for Quality Longterm Care
National Council on Aging
National Guardianship Association
NCRC
OVC/Elder Justice Initiative, US DOJ
Penn Health Brain Research Center
Penn Memory Center
SeniorLAW Center
SeniorSafe
SIFMA
Splaine Consulting
The American Muslim Senior Society
U.S. Commodity Futures Trading Commission
Women's Institute for a Secure Retirement (WISER)



STATE

Aging Resources of Central Iowa
Alabama Securities Commission

AL Department of Human Resources
Alaska Legal Services Corporation
Bureau of APS, Div. of Senior Citizens, Dept. of Public Health and Social Services
California Department of Social Services
California Elder Justice Coalition
Connecticut Department of Banking
Delaware Department of Justice - Senior Protection Initiative
Department for Aging & Rehabilitative Services
Department of Children and Families, APS
DC Long-Term Care Ombudsman Program
Financial and Consumer Services Commission of New Brunswick, Canada
Florida Department of Children & Families, APS
Idaho Commission on Aging
Illinois Department of Aging
Indiana Division of Aging, APS
Indiana Secretary of State, Securities Division
Iowa Department on Aging
Legal Counsel for the Elderly
Long Term Care Ombudsman Program
Maine Office of Securities
Maryland Consumer Rights Coalition
Maryland Department of Human Resources
Meritan, Inc., - Memphis
Minnesota Department of Commerce
New Mexico Regulation & Licensing, Securities Div.
Montana Adult Protective Services
New York State Coalition on Elder Abuse
NJ Dept. of Human Services, Div. of Aging Services
Office of the LTC Ombudsman
Ohio Coalition for Adult Protective Services
Ohio Crime Victim Services
Ohio Department of Commerce
Oklahoma Department of Human Services, APS
Oregon Department of Human Services
PA Department of Aging
Senior Empowerment, LLC
School of Social Work, Monmouth University
State of Alaska, Adult Protective Services
State of Maine Office of Securities
Texas State Securities Board
UNT Dallas College of Law Community Center
Vermont Department of Financial Regulation
Virginia Credit Union League

LOCAL

Active Aging, Inc
ADRC of Barron, Rusk & Washburn Counties
ADRC of Marinette County
ADRC of Southwest Wisconsin-Green County
Aging & Disability Resource Center, Washington CO
Barron County Dept, of Health & Human Services
BCDHHS

Event Partners

Burnett County Health & Human Services
Care Horizon, Incorporated
Crawford Co. Human Services
Crime Victim Services
Daily Living Center
Department of Human Services
Department of Insurance, Securities and Banking
Dunn County Department of Human Services
DuPage County Community Services APS
El Paso County Adult Protective Services
Elder Abuse Prevention Project of Greater Boston
Legal Services
ElderConsult Geriatric Medicine
ElderSAFE Center, Charles Smith Life Communities
Fisher Consultants LLC
Greater Augusta Coalition Against Adult Abuse
Greater Wisconsin Agency on Aging Resources, Inc.
Hero Martial Arts
Ince Counseling (former known as Counseling & Coaching Concierge)
Institute of Gerontology
Jefferson County, WI APS
Jewish Family Service
Law Office of Frank G. King
Legacy Hospice
Lifespan of Rochester
Long Beach Elder Abuse Prevention Team
Lucas County Job and Family Services
Madera County Adult Protective Services
Marbella Services
Metropolitan Family Serv., Evanston/Skokie Valley
Monterey County Dept. of Social Services
Montgomery County Elder/Vulnerable Adult Abuse Task Force
Montgomery County State's Attorney's Office
NYC HRA/APS
Network for Victim Recovery of DC
Oneida Tribe of Indians of Wisconsin
Pepin County Aging Unit
Philadelphia Corporation for Aging
Placer County Adult Protective Services
Portage County Adult Protective Services
Richland County Health and Human Services
Rock County Adult Protective Services
Sacramento County
Sagadahoc County Sheriff's Office
Seabury Resources for Aging
St. Tammany SALT Council
Tammra A. Hasling, LLC
Teller County Department of Human Services (CO)
University of the District of Columbia
Volunteer Guardian Program
Watauga County Social Services
Wilson County DSS
York County Elder Abuse Task Force

ADVOCATES

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Roy Herzbach
Sandy Shields
Sharon Diaz
Shelly Jackson
Sherry Feggins
Tammra A. Hasling
Tom Scott
Trisha Bailkey



Reception Join Us!

World Elder Abuse Awareness Day **Fourth GLOBAL Summit**

June 5, 2018

5:00 PM - 7:00 PM

United States Capitol
Capitol Visitor's Center
First St NE — SVC Room 209

Directions from SEC

Head west on F Street NE towards Columbus Circle NE. F Street NE turns left and becomes Columbus Circle NE. Continue onto First Street NE.

Turn right at East Capitol Street NE onto the pathway that slopes down.

Continue through Capitol Visitor's Center security.

Enter the main atrium and make an immediate right.

You will see a sign for Senate Meeting Rooms. Take the escalator down to the lower level.

At the bottom of the escalator you will see the Senate Appointment Desk. Tell them you are there for the reception and they will direct you to the room.