



7th Annual

NAPSA

Summit on Elder Financial Exploitation



September 1, 2016
Loews Philadelphia Hotel

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8:30 AM – 8:45 AM	<p>Welcome</p> <p>Betty Malks, NAPSA Financial Exploitation Advisory Board and Summit Chair</p> <p>Bill Benson, NAPSA National Policy Advisor</p>
8:45 – 9:15 AM	<p>Opening Remarks</p> <p>Emily Cardin, Daughter & Caregiver to Her Mother, a Scam Victim</p>
9:15 AM – 10:30 AM	<p style="text-align: center;"><i>Keynote Address</i></p> <p><i>Whealthcare: What It Is and How We Can Implement It</i> (Jason Karlawish, Coordinator)</p> <p><i>Explaining Whealthcare</i> Jason Karlawish, MD, Co-Director, Penn Memory Center</p> <p><i>Building Bridges to Wealth: Building Bridges to Whealthcare</i> Keith Weigelt, PhD, MBA, Professor, Wharton School Jill Bazelon, PhD, Program Director, University of Pennsylvania School of Business</p> <p><i>Enforcing Whealthcare: the Philadelphia Financial Exploitation Prevention Task Force</i> Joe Snyder, MA, Philadelphia Corporation for Aging</p>
10:30 AM – 11:15 AM	<p>Making Elder Abuse Visible: A Media Panel (Joe Snyder, Coordinator)</p> <p>Charlotte Sutton, Philadelphia Inquirer Chris O’Connell, Fox News, Philadelphia Paul Kurtz, KYW News Radio Linda Riley, Community Relations, Philadelphia Corporation for Aging</p>
11:15 AM – 12:00 PM	<p>New York State’s Innovative Approaches to Elder Financial Abuse</p> <p><i>Grandkids Against the Grandparent Scam</i> Gary Brown, Assistant Attorney General, NY State Office of Attorney General</p> <p><i>The New York State Cost of Financial Exploitation Study</i> Alan Lawitz, Director, Bur. of Adult Services, NY State Office of Children & Families</p> <p><i>Also: clips from Alive Inside, a film about the power of music & Alzheimer’s Disease</i></p>
12:00 PM - 12:15 PM	<p><i>Award Ceremony</i></p> <p>Barbara McGinity Service to Seniors Award</p>

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<p>12:15 PM – 1:15 PM</p>	<p>Lunch <i>(provided)</i></p> <p>CFPB Elder Financial Abuse Initiatives Nora Eisenhower, Director, Office for Older Americans, Consumer Financial Protection Bureau</p>
<p>1:15 PM – 2:30 PM</p>	<p>Advancing the Cause: Legislators and Regulators Work to Protect Older Persons (Lisa Bleier, Coordinator)</p> <p>SIFMA Investor Toolkit & Legislative Updates Lisa Bleier, Managing Director and Associate General Counsel, SIFMA</p> <p>Proposed Rule Addressing Elder Financial Abuse FINRA Gerri Walsh, Senior VP, FINRA Investor Education Foundation</p> <p>NASAA's Model Legislation and Other Initiatives Judith Shaw, NASAA President and Securities Administrator, Maine</p>
<p>2:30 PM – 3:00 PM</p>	<p>California Pioneers New Approaches (Prescott Cole, Coordinator)</p> <p>Suing the Swindlers: The Role of Civil Attorneys Prescott Cole, Senior Attorney, CA Advocates for Nursing Home Reform Bill Benson, NAPSA National Policy Advisor</p> <p>It Takes a Team: California FAST Team Results Debra Larson, Sacramento Co. APS:</p>
<p>3:00 PM – 3:30 PM</p>	<p>Quick, Accurate Tool to Assess Financial Capacity</p> <p>Peter Lichtenberg, PhD, Director, Institute of Gerontology, Wayne State University</p>
<p>3:30 PM – 4:00 PM</p>	<p>NIEFE – Report on Research Initiatives</p> <p>Angela Ghesquiere, PhD, MSW, Research Program Manager, Brookdale Center for Healthy Aging and Longevity, Hunter College Jason Burnett, Ph.D, Assistant Professor, University of Texas Medical School</p>
<p>4:00 PM – 4:55 PM</p>	<p>Action Plan – Group Discussion</p> <p>Lisa Bleier, Facilitator</p>
<p>4:55 PM – 5:00 PM</p>	<p>Wrap-Up & Closing</p> <p>Betty Malks, NAPSA Financial Exploitation Advisory Board and Summit Chair</p>