

5th ANNUAL SUMMIT ON ELDER FINANCIAL EXPLOITATION

Convened by the NAPSA Elder Financial Exploitation Advisory Board

OCTOBER 31, 2014

MARRIOTT DOWNTOWN WATERFRONT – PORTLAND, OREGON

AGENDA AT-A-GLANCE

9:00 AM – 9:15 AM	<p>OPENING REMARKS Betty Malks, Chair, NAPSA Elder Financial Exploitation Advisory Board & Summit Bill Benson, NAPSA National Policy Advisor US Senators Ron Wyden (<i>invited</i>) US Senator S. Jeff Merkley (<i>invited</i>)</p>
9:15 AM – 10:15 AM	<p><i>Keynote Address</i> ASSURING FINANCIAL SECURITY WITH AGING: ADDRESSING THE CHALLENGES OF COGNITIVE AGING & IMPAIRMENT Jason Karlawish, MD, University of Pennsylvania, Perelman School of Medicine; Author, www.jasonkarlawish.com Problems related to finances are among the most common forms of elder abuse and neglect. In addition, compared to younger adults, older adults are more likely to make decision that, while perhaps within the realm of legitimate and legal, are not in their reasonable financial best interests. This lecture will describe the range of changes seen in older adults' cognitive abilities and to explain their clinical significance with attention to matters related to financial security. It will distinguish among the concepts of cognitive aging, mild cognitive impairment and dementia; explain the concepts of decision making capacity and competency and how they differ from cognition. It will present models for assessing capacity and how they can be applied in day-to-day practice.</p>
10:15 AM – 10:30 AM	<p>BREAK</p>
10:30 AM – 11:15 AM	<p>THE NUTS AND BOLTS OF BANKING & SECURITIES 101 Judith Kozlowski (Chair) Ron Long, Wells Fargo Advisors Ira Hammerman, Securities Industry and Financial Markets Association Beatrix Lam Hom, HSBC Linda Navarro, Oregon Bankers Association How do banks and securities firms operate? What are the similarities and differences? How do they get cases and what happens to them? How can they help with the investigations? Learn about new initiatives from banks and securities firms.</p>
12:00 PM -1:00 PM	<p>LUNCH (PROVIDED) - THE STORY OF HUGUETTE CLARK Meryl Gordon, Author, <i>Phantom of Fifth Avenue</i></p>
1:00 PM – 1:30 PM	<p>CFPB'S OFFICE FOR OLDER AMERICANS: YOUR PARTNER IN RAISING AWARENESS AND BUILDING STRENGTH Nora Dowd Eisenhower, Assistant Director, Office for Older Americans, Consumer Financial Protection Bureau The federal Consumer Financial Protection Bureau is working to raise awareness and build a shared vision across diverse networks to make it more difficult to exploit older Americans. Learn about the resources currently available to support your efforts, first to prevent elder financial exploitation, and then to respond efficiently.</p>

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1:30 PM - 2:00 PM	<p>USING TECHNOLOGY TO ADDRESS ELDER FINANCIAL ABUSE Liz Loewy (Chair) Howard Tischler, EverSafe Rose Corvo, Early Warning</p> <p>Seniors and caregivers who are technology-savvy have effective ways to prevent and detect fraud – at their fingertips. Learn how two companies address exploitation and identity theft through analyzing customers’ banking activity. One is used by financial institutions and the other focuses on older consumers and caregivers.</p>
2:00 PM – 2:30 PM	<p>SCAMS DU JOUR Gary Brown, New York Attorney General's Office Barbara McGinity, Better Business Bureau Education Foundation of Greater Houston</p> <p>Often the newest scams are old ones redressed with a new twist or tactic. What consumers are currently reporting and how the scams work.</p>
2:30 PM – 2:45 PM	BREAK
2:45 PM – 3:15 PM	<p>GUARDIANSHIP AS A RESPONSE TO EXPLOITATION Jean Callahan, Brookdale Center for Healthy Aging at Hunter College</p> <p>Guardianship can be an effective response to financial exploitation where the victim lacks capacity. This session will use a case example to focus the discussion and will include balancing autonomy vs. protection, and the pitfalls of guardianship.</p>
3:15 PM – 4:00 PM	<p>AARP: COMBATTING FINANCIAL EXPLOITATION THROUGH ADVOCACY Diana Noel, National AARP Jerry Cohen, AARP State Chapter</p> <p>Overview of AARP’s advocacy efforts and how to strategically fight elder financial abuse at the state level.</p>
4:00 PM – 4:30 PM	<p>APS AND CIVIL LITIGATORS: ALLIES IN THE FIGHT AGAINST FINANCIAL ELDER ABUSE Prescott Cole (Chair) CA Advocates for Nursing Home Reform Kathryn Stebner, Esq., Stebner and Associates</p> <p>Law enforcement and government entities often do not have the resources or expertise to shut down enterprises that prey upon the elderly. This panel explores how APS can work with tort and class action litigators to stop commercial predators, and to develop strategies to educate victims on pursuing remedies through civil litigation.</p>
4:30 PM – 4:45 PM	<p>NEXT STEPS AND COMMITMENTS TO ACTION Betty Malks, Chair, NAPSA Elder Financial Exploitation Advisory Board & Summit Bill Benson, NAPSA Policy Advisor</p>