

World Elder Abuse Awareness Day

FIFTH GLOBAL SUMMIT

15th Anniversary | Tuesday, June 11, 2019

Securities and Exchange Commission | 100 F Street, N.E., Washington, DC

- 10:00- 10:15 **Welcome** - Betty J. Malks, NAPSA, and Owen Donley, Chief Counsel, Office of Investor Education and Advocacy, SEC
Introductory Remarks: Lance Robertson, HHS, Administration for Community Living, Administrator and Assistant Secretary for Aging
- 10:15-10:45 **Keynote**
Dr. Elizabeth Podnieks, Creator and Founder of WEAAD
Dr. Cynthia Thomas, National Academy of Sciences, Engineering and Medicine
- 10:45- 11:45 **Technology's Role in Protecting Against Abuse in Later Life**
Moderator: Liz Loewy, EverSafe
Marci Lobel-Esrig, SilverBills
Rob Wray, BlueStar SeniorTech
Howard L. Tischler, EverSafe
- 11:45- 12:45 **FINRA Rule: One year later**
Moderator: Lisa Bleier, SIFMA
Ron Long, Wells Fargo
Aisling Murphy, Vanguard
Melissa Shea, Fidelity
Jim Wrona, FINRA
- 12:45 2:30 Lunch on your own
- 2:30-3:15 **Media Role in Elder Financial Exploitation**
Yuka Hayashi , Reporter at The Wall Street Journal
Nick Leiber, published in Bloomberg Businessweek, Bloomberg News, and the New York Times
- 3:15-3:45 **Suspicious Activity Reports on Elder Financial Exploitation: Issues and Trends**
Stacy Canan
- 3:45-4:15 **Age Friendly Banking**
Karen Kali, NCRC
- 4:15– 4:45 **Newly Expanded Records Request Form**
Joe Snyder and Kathleen Quinn, NAPSA
- 4:45-5:00 **Closing Remarks-** Betty J. Malks

.....**Capitol Hill Reception to Follow**.....

6:30 pm. – 8:30 pm

Dirksen Senate Office Building – Room 215