### 7th Annual NAPSA Summit on Elder Financial Exploitation

**8:30 AM – 8:45 AM**  
**Welcome**  
Betty Malks, NAPSA Financial Exploitation Advisory Board and Summit Chair  
Bill Benson, NAPSA National Policy Advisor

**8:45 – 9:15 AM**  
**Opening Remarks**  
Emily Cardin, Daughter & Caregiver to Her Mother, a Scam Victim

**9:15 AM – 10:30 AM**  
**Keynote Address**  
*Whealthcare: What It Is and How We Can Implement It*  
(Jason Karlawish, Coordinator)

**Explaining Whealthcare**  
Jason Karlawish, MD, Co-Director, Penn Memory Center

**Building Bridges to Wealth: Building Bridges to Whealthcare**  
Keith Weigelt, PhD, MBA, Professor, Wharton School  
Jill Bazelon, PhD, Program Director, University of Pennsylvania School of Business

Joe Snyder, MA, Philadelphia Corporation for Aging

**10:30 AM – 11:15 AM**  
**Making Elder Abuse Visible: A Media Panel**  
(Joe Snyder, Coordinator)

Charlotte Sutton, Philadelphia Inquirer  
Chris O’Connell, Fox News, Philadelphia  
Paul Kurtz, KYW News Radio  
Linda Riley, Community Relations, Philadelphia Corporation for Aging

**11:15 AM – 12:00 PM**  
**New York State’s Innovative Approaches to Elder Financial Abuse**

*Grandkids Against the Grandparent Scam*  
Gary Brown, Assistant Attorney General, NY State Office of Attorney General

*The New York State Cost of Financial Exploitation Study*  
Alan Lawitz, Director, Bur. of Adult Services, NY State Office of Children & Families  
*Also: clips from Alive Inside, a film about the power of music & Alzheimer’s Disease*

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