

# Enforcing WhealthCare: The Philadelphia Financial Exploitation Prevention Taskforce

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# Philadelphia Financial Exploitation Prevention Task Force Members

- Alzheimer's Association-Delaware Valley Chapter
- Beneficial Bank
- Citizens Bank
- CARIE
- DE Valley Security Officers Group (DVSOG)
- Mayors Office of Community Empowerment & Opportunity
- Philadelphia Corporation for Aging
- Philadelphia District Attorney
- Philadelphia Police Department
- PNC Bank
- Republic Bank
- Senior Law Center
- TruMark Credit Union
- University of Pennsylvania Healthy Brain Research Center
- U.S. Department of Homeland Security

# Formation of Taskforce

- PCA/Wachovia Project
- Financial Services Roundtable
- Mayor's Office

# Goals of Taskforce

- Formed to foster collaboration
- Provide practical training
- Create and implement an awareness and education program

# Benefits of Taskforce Collaboration

- Breaking down obstacles
- Forming relationships
- Learning the strengths and weaknesses of each system

# Enforcing WhealthCare

- How do we move to action?
- How do we all benefit?

# Enforcing WhealthCare

- What are our challenges?
- How do we change habits and the environment and set up methods to monitor?

# Enforcing WhealthCare

- What does research and data tell us?
- What do older adults value?



# Enforcing Whealth Care

- Financial institutions on the front line of screening for cognitive impairment and thus promoting financial security
- Surveillance of Transaction
- Passive monitoring view only accounts

# Enforcing WhealthCare

- How do we communicate with older adults?
- Creating resources to reach out to trusted others and make referrals to adult protective services, memory centers, legal service providers and law enforcement

# Moving to Action

- National Institute on Elder Financial Exploitation
- APS
- Financial Institutions
- Medical Profession
- Law Enforcement

# Enforcing WhealthCare

- Commitments!!