National Adult Protective Services Association | Elder Financial Exploitation Advisory Board

8th Annual Summit on Elder Financial Exploitation

From the Ground Up: Strengthening our Capacity to Protect Seniors

August 31, 2017

Hilton City Center | Milwaukee, WI
<table>
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<th>Time</th>
<th>Event</th>
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<tr>
<td>9:00 AM – 9:15 AM</td>
<td><strong>Welcome</strong>&lt;br&gt;<strong>Betty Mals</strong>, NAPSA Financial Exploitation Advisory Board and Summit Chair&lt;br&gt;<strong>Bill Benson</strong>, NAPSA National Policy Advisor</td>
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<td>9:15 AM – 10:15 AM</td>
<td><strong>The Justice Our Victims Deserve</strong>&lt;br&gt;<strong>Paul Greenwood</strong>, Deputy District Attorney, San Diego District Attorney&lt;br&gt;A lively, interactive session on prosecuting elder abuse in the courts</td>
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<td>10:15 AM – 10:30 AM</td>
<td><strong>Break</strong></td>
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<td>10:30 AM – 11:30 AM</td>
<td><strong>Useful Lessons from the World of Research</strong>&lt;br&gt;<strong>Cognitive, Emotional and Social Dimensions of Interpersonal Vulnerability in Older Adulthood</strong>&lt;br&gt;<strong>R. Nathan Spreng</strong>, PhD, Cornell University, College of Human Ecology&lt;br&gt;<strong>A Broad Typology to Understand Elder Financial Exploitation</strong>&lt;br&gt;<strong>David Burnes</strong>, PhD, University of Toronto</td>
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<td>11:30 AM – 12:00 PM</td>
<td><strong>We’re From the Government and We Really Are Here to Help</strong>&lt;br&gt;<strong>M. Owen Donley</strong>, Chief Counsel, Securities &amp; Exchange Commission, Office of Investor Education and Advocacy&lt;br&gt;<strong>Michael Herndon</strong>, Deputy Assistant Director, Consumer Financial Protection Bureau, Office for Older Americans</td>
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<td>12:00 PM – 1:15 PM</td>
<td><strong>Lunch (provided)</strong>&lt;br&gt;<strong>Presentation of the Barbara McGinity Service to Seniors Award</strong></td>
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<td>1:15 PM – 1:45 PM</td>
<td><strong>Building Bridges to Wealth: Wharton School of Business’ Financial Abuse Prevention Program</strong>&lt;br&gt;<strong>Keith Weigelt</strong>, PhD, MBA, Professor, Wharton School of Business&lt;br&gt;<strong>Jill Bazelon</strong>, PhD, Program Director, Bridges to Wealth</td>
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8th Annual
NAPSA
Summit on Elder Financial Exploitation

1:45 PM – 2:30 PM
Building Bridges to Bankers
Iris Freeman, Chair, Minnesota Elder Justice Center
Beatrix Lam-Hom, Triage Manager, HSBC North America
Ron Long, Senior Vice President, Wells Fargo Advisors

2:30 PM – 3:15 PM
Investigating Potential Exploitation: Balancing Autonomy and Protection
Kyle Innes, Assistant Vice President, SIFMA
Tara Patet, Supervising Attorney, Special Victims Unit, St. Paul, MN City Attorney
Kathleen Quinn, Senior Advisor, NAPSA

3:15 PM – 3:30 PM
Break

3:30 PM – 4:15 PM
Advanced Elder Financial Exploitation Investigation Tools
Investigating, Prosecuting and Recovering Assets
Richard Albrecht, Institute on Protective Services
How Forensic Accountancy Can Help
Douglas Cash, MBA, CFE, CFI, CFCI, Forensic Accountant, Eide-Bailly

4:15 PM – 4:25 PM
NIEFE: Bringing Everyone Up to Date
Joe Snyder & Kathleen Quinn, Board Members, National Institute for Elder Financial Exploitation

4:25 PM – 4:50 PM
Action Plan – Group Discussion
Bill Benson, NAPSA National Policy Advisor

4:50 – 5:00 PM
Wrap-Up & Closing
Betty Malks, NAPSA Financial Exploitation Advisory Board and Summit Chair