



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



8th Annual  
**NAPSA**

Summit on Elder Financial Exploitation

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

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1:45 PM – 2:30 PM	<b>Building Bridges to Bankers</b> 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	<b>Investigating Potential Exploitation: Balancing Autonomy and Protection</b> 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	<b>Break</b>
3:30 PM – 4:15 PM	<i>Advanced Elder Financial Exploitation Investigation Tools</i> <b>Investigating, Prosecuting and Recovering Assets</b> Richard Albrecht, Institute on Protective Services <b>How Forensic Accountancy Can Help</b> Douglas Cash, MBA, CFE, CFI, CFCI, Forensic Accountant, Eide-Bailly
4:15 PM – 4:25 PM	<b>NIEFE: Bringing Everyone Up to Date</b> Joe Snyder & Kathleen Quinn, Board Members, National Institute for Elder Financial Exploitation
4:25 PM – 4:50 PM	<b>Action Plan – Group Discussion</b> Bill Benson, NAPSA National Policy Advisor
4:50 – 5:00 PM	<b>Wrap-Up &amp; Closing</b> Betty Malks, NAPSA Financial Exploitation Advisory Board and Summit Chair