



World Elder Abuse Awareness Day

Seventh GLOBAL Summit

Monday, June 14, 2021 | Virtual Event

11:30 AM – 4:30 PM (Eastern Time)

Agenda

11:30 AM

Welcome – Betty F. Malks, Chair WEAAD Summit

Lori Schock, Director, Securities and Exchange
Commission's Office of Investor Education and
Advocacy

Dr. Elizabeth Podnieks, Creator and Founder of
WEAAD

11:50 AM

Ireland's Transformation of Safeguarding Older Adults

Including a discussion of practices in nine countries

Dr. Amanda Phelan

Professor in Ageing and Community Nursing
School of Nursing & Midwifery, Trinity College
Dublin

15 min live Q & A with Dr. Phelan

12:50 PM

Ontario's Success in Naming Trusted Contacts

Moderator: Lisa Bleier, Managing Director and
Associate General Counsel, SIFMA

Speaker: Michael Tracey, Senior Advisor,
Behavioural Insights,
Ontario Securities Commission

1:20 PM

"The Talk:" Discussing Finances with Your Parents

Moderator: Lynda MacDougall, Executive Director
Regulatory Operations Program
Director, JP Morgan Chase & CO

Panelists: Darius Kingsley, Business
Practices Executive for Consumer
Banking, JP Morgan Chase & Co.
Jannell Huff, Bank of the Rockies
Emily Allen, AARP

- 2:00 PM “Not (Legally) Dead Yet” – The Shocking History of Guardianship in America
 Jason Karlawish, MD, University of Pennsylvania
 Penn Memory Center & P3MB, the Penn Program
 for Precision Medicine for the Brain and
 Author of *The Problem of Alzheimer’s*
- 2:20 PM BREAK
- 2:30 PM Global Vaccines During Pandemic Times
 Moderator: E. Elizabeth Loewy, Co-Founder & COO,
 EverSafe
 Speaker: Cindy Cox-Roman, CEO, HelpAge USA
- 2:50 PM Loneliness, Cognition, and Confidence: Implications for Financial Decision Making
 Moderator: Gary Mottola, Ph.D., FINRA Investor
 Education FoundationCo-
 Panelists: Patricia Boyle, Ph.D., Rush Alzheimer’s
 Disease Center
 Christopher C. Stewart, Ph.D., Indiana
 University School of Medicine
 Olivia Valdes, Ph.D., FINRA Foundation
- 3:35 PM Banks Addressing Cognitive Impairment and Financial Caregiving
 Moderator: Sam Kunjukunju, American Bankers
 Association
 Panelists: Debbie Gulan, Regional Community
 Banking Manager, IncredibleBank
 Meghan Dunn, Assistant Vice President,
 Community Relations, Mizuho Americas
- 4:20 PM Wrap-Up - Betty F. Malks, Chair WEAAD Summit