



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,
Consumer and Community Banking-
Regulatory Operations-Program
Governance Office, JP Morgan Chase
& Co.

Panelists: Darius Kingsley, Managing Director,
Head of Business Practices, Chase
Consumer Banking, JP Morgan Chase
& Co.
Jennell Huff, Relationship Executive,
Community Outreach Coordinator,
Bank of the Rockies
Emily Allen, Senior Vice President,
Programs for AARP Foundation

- 2:00 PM “Not (Legally) Dead Yet” – The Shocking History of Guardianship
in America
Dr. 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: Dr. Gary Mottola, Research Director, FINRA
Investor Education Foundation and Social
Psychologist
Panelists: Dr. Patricia Boyle, Professor of Psychiatry
and Behavioral Sciences and
Neuropsychologist, Rush Alzheimer’s Disease
Center at Rush University Medical Center
Dr. Christopher C. Stewart, Assistant
Professor of Clinical Neurology, Indiana
University School of Medicine

Dr. Olivia Valdes, Associate Principal
Research Analyst, FINRA Investor Education
Foundation

- 3:35 PM Banks Addressing Cognitive Impairment and Financial Caregiving
Moderator: Sam Kunjukunju, Senior Director, Bank
Community Engagement, American Bankers
Association
Panelists: Debbie Gulan, Regional Community
Bank Manager, IncredibleBank
Meghan Dunn, Assistant Vice President,
Community Relations, Mizuho Americas
- 4:20 PM Wrap-Up - Betty F. Malks, Chair WEAAD Summit