World Elder Abuse Awareness Day
Seventh GLOBAL Summit
Second Virtual Event

17th Anniversary | Monday, June 14, 2021 | 11:30 AM – 4:30 PM EDT

CONVENCING ORGANIZATIONS

NAPSA NATIONAL ADULT PROTECTIVE SERVICES ASSOCIATION

LEAD SPONSOR

JPMORGAN CHASE & CO.

TOP SPONSOR

sifma
June 14, 2021

Dear WEAAD Attendees:

On behalf of the National Adult Protective Services Association and International Network for the Prevention of Elder Abuse, welcome to the Seventh Annual Global Summit in celebration of the 17th anniversary of World Elder Abuse Awareness Day.

Our deepest gratitude also goes to our esteemed group of national and international speakers, who are true pioneers and champions for elder justice, as well as our event partners.

This event would not have been possible without the generous support from our lead sponsor JP Morgan Chase & Co. and top sponsor SIFMA.

Betty F. Malks
Chair, WEAAD Summit

“What WEAAD is: the driving force of a caring culture where we celebrate and respect older persons and their human rights. There is a need for extraordinary leadership, clarity of vision, and complete commitment in knowing that in a civil society, each person can and must resolve to do better, be stronger, to reach further, to find solutions.”

Dr. Elizabeth Podnieks, Founder of WEAAD
Agenda

Welcoming and Opening Remarks  11:30 a.m.
Betty F. Malks, Chair WEAAD Summit
Lori Schock, Director, Office of Investor Education and Advocacy, Securities and Exchange Commission
Dr. Elizabeth Podnieks, Creator and Founder of WEAAD

Keynote: Ireland’s Transformation of Safeguarding Older Adults– Including a discussion of practices in nine countries  11:50 a.m.
Dr. Amanda Phelan, Professor in Ageing and Community Nursing, School of Nursing & Midwifery, Trinity College Dublin

15 min live Q & A with Dr. Phelan

Ontario’s Success in Naming Trusted Contacts  12:50 p.m.
Moderator: Lisa Bleier, Managing Director and Associate General Counsel, SIFMA
Speaker: Michael Tracey, Senior Advisor, Behavioural Insights, Ontario Securities Commission

“The Talk:” discussing Finances with Your Parents  1:20 p.m.
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
"Not (Legally) Dead Yet" - The Shocking History of Guardianship 2:00 p.m.

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

Break 2:20 p.m.

Global Vaccines During Pandemic Times 2:30 p.m.

Cindy Cox-Roman, CEO, HelpAge USA

Loneliness, Cognition, and Confidence: Implications for Financial Decision Making 2:50 p.m.

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

Banks Addressing Cognitive Impairment and Financial Caregiving 3:35 p.m.

Moderator: Sam Kunjukunju, Senior Director, Bank Community Engagement, AmericanBankers Association
Panelists: Debbie Gulan, Regional Community Bank Manager, IncredibleBank
Meghan Dunn, Assistant Vice President, Community Relations, Mizuho Americas

Wrap-Up 4:20 p.m.

Betty F. Malks, Chair WEAAD Summit
Commitment to community

We proudly support the National Adult Protective Services Association and applaud their positive impact on protecting our elder and disabled communities nationwide.
SENIOR INVESTOR PROTECTION – SIFMA VIEWS AND ACTION

More than half of older Americans utilize financial advisors, and SIFMA is committed to finding solutions that help those advisors protect their senior investors from exploitation and fraudulent practices. SIFMA has been working with industry members, academics, and state and federal lawmakers to advance policies, practices, rules, regulations, and laws to enhance senior investor protections.

SIFMA’S SENIOR INVESTOR ADVOCACY PLAN

- ADVANCE state legislation that strengthens senior investor protection
- PROMOTE federal legislation to provide firms with additional resources
- ADVOCATE for federal guidance from regulatory agencies
- SECURE increased funding to prevent financial abuse
- COLLABORATE with scientific and academic experts
- CONVENE industry, scientific and academic experts at SIFMA’s Senior Investor Protection events

* Advocating for Senior Security Act of 2021, which will provide for a study to capture the extensive costs of financial exploitation
* Continuing work on a single portal platform reporting project with NAPSA, Eversafe and the Hunter College Brookdale Center on Aging

SPONSORS

ABA FOUNDATION

FINRA

EVERSAFE
Event Partners

**National**
- Ally Bank
- Long Term Care Ombudsman Program/Leanne Langston
- National Association of Social Workers (NASW)
- Stifel
- Wells Fargo Bank
- Women’s Institute for a Secure Retirement (WISER)

**Local/Regional**
- Adult Protection, MN Department of Human Services, Aging & Adult Services
- AgeOptions
- Akwesasne Elder Abuse Multidisciplinary Team
- Anderson County Department of Social Services
- APS Sacramento County, State of CA
- Arlington County Virginia Department of Human Services ADHD
- Ashley Knudtson/Nebraska DHHS
- Barnwell County South Carolina Department of Social Services
- Benjamin Rose Institute on Aging
- California Department of Financial Protection & Innovation
- Christie Ackmann, LCSW State of Nevada, Aging & Disability Services Division, APS
- Department of Social Services (APS)-South Carolina
- Ebony Sumpter South Carolina Department of Social Services
- ElderSAFE Center
- ElderSAFE Center, Charles E. Smith Life Communities
Local/Regional continued

Ellen Mohling/State of Nebraska
GECAC AAA
Hennepin County Adult Protective Services
Humboldt Del Norte Long Term Care Ombudsman
Illinois Department on Aging
Leila Koetter/NE DDHS Service Coordinator
Lexington County South Carolina Department of Social Services
Lifespan of Greater Rochester
Montgomery County Maryland Adult Protective Services
Nebraska DHHS
New York State Coalition on Elder Abuse
Ohio Coalition for Adult Protective Services
Philadelphia Corporation for Aging
Philadelphia Financial Exploitation Prevention Taskforce
Rheba DeWitt/Charleston County DSS Adult Day Advocacy Program
Sacramento County APS
Santa Cruz County Adult Protective Services
South Carolina Victim Assistance Network
State of Nebraska Division of Developmental Disabilities
Texas Adult Protective Services
Utah Division of Aging & Adult Services, Adult Protective Services
Zeta Phi Beta Sorority Inc. Delta Xi Zeta Chapter
**Event Partners**

**Individual**

Amy Partain  
Ashley Knudtson  
Brandy Curran  
Celia Brown  
Charmaine Kelly  
Christie Ackmann  
Christina St.Cyr  
Denise Shukoff  
Ellen Mohling  
Erica Moyer  
Gladys Glover  
Heather Gilliland  
Julia A. Bedenbaugh  
Laura Deitz  
Lavada Singleton  
Lexie Kuhn  
Marian Liu  
Melissa Waite  
Patricia Orzechowski  
Philip C. Marshall  
Rhonda Green  
Robert Thompson  
Sarah White  
Shaunda Lewis
Individual continued

Stacey Mabrito
Terron H. Lairson
Tom Kimbar
Tyler Martinez-Hakes
Wanda Joseph
Whitney Nettleton