

World Elder Abuse Awareness Day

Seventh GLOBAL Summit

Second Virtual Event

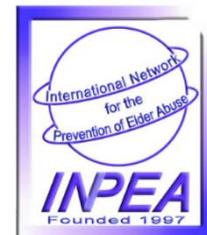
17th Anniversary | Monday, June 14, 2021 | 11:30 AM – 4:30 PM EDT



**WORLD ELDER ABUSE
AWARENESS DAY**

Building Strong Support for Elders

CONVENING ORGANIZATIONS



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Welcome

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.

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

Agenda continued

"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

LEAD SPONSOR



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.

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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
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- 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



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

Event Partners

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

Event Partners

Individual continued

Stacey Mabrito

Terron H. Lairson

Tom Kimbar

Tyler Martinez-Hakes

Wanda Joseph

Whitney Nettleton