



# 14th Annual National Elder Financial Exploitation Summit

August 31, 2023

## AGENDA

<b>Breakfast</b>	<b>7:30- 8:30 AM</b>
<b>Welcome and Introductions</b> <b>Betty F. Malks</b> , Financial Exploitation Advisory Board & Summit Chair	<b>8:30 AM</b>
<b>Keynote</b> <b>Debra Whitman</b> , EVP & Chief Public Policy Officer, AARP with Jilenne Gunther - Director, BankSafe, AARP	<b>8:45 AM</b>
<b>New Initiatives at NAPSA/FEAB</b> <b>HelpVul: Marin Gibson</b> , SIFMA, Managing Director & Associate General Counsel for State Government Affairs <b>Legislation: Model Act for Financial Records to APS - Liz Loewy</b> , HelpVul & COO, EverSafe	<b>9:15 AM</b>
<b>All in This Together: Adult Protective Services and Financial Institutions' Efforts to Combat Elder Financial Exploitation</b> <b>Joe Snyder</b> : Overview of FEAB white paper released June 2, 2023	<b>9:45 AM</b>
<b>Break</b>	<b>10:00 AM</b>
<b>All in This Together: Adult Protective Services and Financial Institutions' Efforts to Combat Elder Financial Exploitation</b> Breakout groups and discussions regarding recommendations	<b>10:15 AM</b>
<b>Barbara McGinity Service Award</b> <b>Betty F. Malks</b>	<b>11:30 AM</b>
<b>How Much Do We Compromise our Autonomy &amp; Self-Determination When Financial Exploitation is a Concern?</b> <b>Silvia Perel-Levin</b> , Main representative of INPEA to the UN in Geneva; Chair of the sub-committee on the human rights of older persons and Past Chair of the Geneva NGO Committee on Ageing; Chair of the Programme Committee of <i>Independent Ageing 2023</i> <b>Ron Long</b> , Principal - Long Life Consultant, 32 years Financial Services including over 12 years with elder financial focus.	<b>11:35 AM</b>
<b>Summit Close</b>	<b>12:30 PM</b>