

Fundamentals of Protecting Seniors from Financial Exploitation

Co-Sponsored by:
Nebraska State Bar Association – Elder Law Section
Nebraska Department of Health and Human Services, State Unit on Aging

P.O. Box 95026
Lincoln, NE 68509-5026
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(402) 471-9700
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www.dhhs.ne.gov/agingtraining

Register early.

Limited seating at some locations

TRAINING IS FREE

Live Via Web Streaming from Lincoln to 11 Locations Statewide

Date:	Wednesday, June 22, 2016
Time:	9:00 a.m. to 5:00 p.m. (CDT) 8:00 a.m. to 4:00 p.m. (MDT)
Place:	Uplinked from NET via web-based Live Streaming to 11 locations in Nebraska or your computer
Topics:	<ul style="list-style-type: none">• Medical-Legal Partnerships – How they Impact Seniors• Office of Public Guardian – First Year Update• Financial Exploitation Case Review• Tips and Strategies on Consumer Protection• Identity Theft Panel: Technology and Internet-related Scams, Banking and Financial Services Scams and Identify Theft Basics• Aging and Disability Resource Center Website Demo• Consumer Law/Finance Issues for Seniors



June 22, 2016

AGENDA

<p>9:00 a.m. – 9:10 a.m. CDT</p>	<p>WELCOME AND INTRODUCTIONS Julie Masters, Ph.D., Department of Gerontology, University of NE at Omaha</p>
<p>9:10 a.m. – 10:00 a.m.</p>	<p>Medical-Legal Partnerships – How they Impact Seniors Ann Mangiameli, J.D., Legal Aid of Nebraska</p>
<p>10:00 a.m. – 10:45 a.m.</p>	<p>Office of Public Guardian – First Year Update Michelle Chaffee, J.D., Office of Public Guardian</p>
<p>10:45 a.m. – 11:00 a.m.</p>	<p>BREAK</p>
<p>11:00 – 12:00 Noon</p>	<p>Financial Exploitation Case Review Cindy Koenig-Warneke, Investigator, Lincoln Police Department</p>
<p>12:00 p.m. – 1:15 p.m.</p>	<p>LUNCH ON YOUR OWN</p>
<p>1:15 p.m. – 2:15 p.m.</p>	<p>Tips and Strategies on Consumer Protection from the Consumer Financial Protection Bureau (CFPB) Nora Dowd Eisenhower, J.D., Assistant Director, Office of Older Americans, CFPB, Washington, D.C.</p>
<p>2:15 p.m. – 3:30 p.m.</p>	<p>Identity Theft Panel Technology and Internet-related Scams, Marcia L. Dority Baker, Assistant Director, Academic Technologies, Information Technology Services, University of Nebraska Lincoln Trends in Banking and Financial Services Scams Mark Quandahl, J.D., Director, NE Department of Banking and Finance “All Roads Lead to Identify Theft,” Ryan S. Sothan, Consumer Protection and Anti-Trust Division, Nebraska Attorney General’s Office</p>
<p>3:30 p.m. – 3:45 p.m.</p>	<p>BREAK</p>
<p>3:45 p.m. – 4:00 p.m.</p>	<p>Aging and Disability Resource Center Website Demo Amy Hochstetler, State Unit on Aging</p>
<p>4:00 p.m. – 5:00 p.m.</p>	<p>Emerging Trends in Consumer Law/Finance Issues for Seniors Lea Wroblewski, J.D., Legal Aid of Nebraska</p>
<p>5:00 p.m.</p>	<p>WRAP-UP AND ADJOURN</p>

Live Streaming will be available at the following locations:

- **Beatrice:** Southeast Community College, 4771 West Scott Road, Kennedy Bldg., Rm K 334
- **Chadron State College:** 1000 Main Street, Old Admin Building, Room 031
- **Columbus:** Central Community college, North Education Center, Room 911, 4500 63rd Street
- **Grand Island:** Central Community College, 3131 West US Hwy 34
- **Hastings:** ESU 9, JWV Room, 1113 East South Street
- **Kearney:** Central Community College, 3519 2nd Avenue, Rm 141
- **Lincoln:** NET, 1800 N. 33rd Street
- **Norfolk:** Northeast Community College, Lifelong Learning Center, 801 E. Benjamin Ave
- **North Platte:** Mid-Plains Community College, North Campus, Room 209, 1101 Halligan Drive
- **Omaha:** Eastern NE Office on Aging, Lower Level Conference Room, 4223 Center Street
- **Scottsbluff:** Western NE Community College, Harms Advanced Technology Center, Room A103, 1601 East 27th Street
- **Sidney:** Western NE Community College, Room 115, 371 College Drive

FACULTY

Julie Masters is Professor and Chair of the Department of Gerontology at the University of Nebraska Omaha. She received her B.A. in psychology from the University of Nebraska Omaha, her M.A. in gerontology from the University of Northern Colorado and her PhD in Community and Human Resources with a specialization in Gerontology from the University of Nebraska-Lincoln. Her research interests include end-of-life planning, healthy aging, aging prisoners and caregiving. Dr. Masters teaches courses on the Omaha and Lincoln campuses.

Ann Mangiameli is the Managing Attorney of the Medical Legal Partnership Project at Legal Aid of Nebraska. She was on the ground floor of the formation of the Nebraska Medical Legal Partnership in 2009 and has assisted in its continued expansion. The Partnership now includes eight medical centers, two ambulatory clinics and a community health center. Ms. Mangiameli practices in the areas of Social Security Disability, Medicaid/Medicare and end of life planning. Her focus is on a holistic approach to medical care which improves client health by removing barriers to medical care and preventing poverty. She was recently appointed to the Advisory Council on Public Guardian for the State of Nebraska. Ms. Mangiameli is a 1991 graduate of Creighton University School of Law.

Michelle Chaffee graduated from UNL with a B.S. in Education and a law degree from the UNL College of Law. While in law school she clerked at the Nebraska Attorney General's Office in the child abuse and drug prosecution unit; as a legal researcher for pre-trial diversion in the Office of Juvenile Service, Nebraska Crime Commission; and a senior law clerk assisting the Guardian ad Litem for 800 developmental disabled children in a class action federal law suit. Michelle's work experience includes staff attorney at Legal Aid, Legislative Aide in the Nebraska Legislature, higher education administration and University Attorney for Risk Management and Legal Counsel at the legislature for the HHS Committee. Michelle began her service as Director of the newly created Office of Public Guardian in December 2014.

Cindy Koenig-Warnke investigates financial crimes against seniors and vulnerable adults. Cindy has attended training in the area of Alzheimer's, vulnerable adult abuse related to physical abuse, sexual abuse, neglect and financial exploitation to nurses, social workers and other professionals who work with the aging population. Cindy received her Graduate Certificate in Gerontology from the University of Nebraska Omaha in December 2013.

Nora Dowd Eisenhower joined the Consumer Financial Protection Bureau (CFPB) to serve as the Assistant Director of its Office of Financial Protection for Older Americans in August 2013. Prior to joining the CFPB, she served as the Senior Vice President of Economic Security and Director of the National Center for Benefits Outreach & Enrollment at the National Council on Aging. Previously, Nora worked as Secretary of the Pennsylvania Department of Aging, where she managed an extensive statewide network of aging services. She has also served as Executive Director for AARP Pennsylvania. Earlier in her career, she fought health care fraud among Medicare beneficiaries at The Center of Advocacy for Rights and Interests of the Elderly (CARIE) and also served as a Pennsylvania deputy attorney general at the Federal Trade Com-

mission in Washington, D.C., where she targeted telemarketing fraud and other matters involving consumer fraud.

Marcia L. Dority Baker has worked at the University of Nebraska-Lincoln since May 2004 when she started at Schmid Law Library, University of Nebraska College of Law. In February 2016 she became the Assistant Director, Academic Technologies at UNL. She has a Master's degree in Information Science and Learning Technologies (MLS) from the University of Missouri-Columbia and a Master's degree in Museum Studies from UNL.

Mark Quandahl is an Omaha attorney appointed by Governor Pete Ricketts as the Director of Nebraska Department of Banking and Finance. Prior to his appointment, Quandahl was in the private practice of law for 27 years, acted as General Counsel to a health care startup company and served as a Director of a Nebraska community bank. He has undergraduate and law degrees from the University of Nebraska-Lincoln.

Quandahl represented the constituents of Nebraska's 31st Legislative District from 1999 to 2005. During his tenure in the Legislature he served as the Chairman of the Banking, Commerce, and Insurance Committee. He also served on the Nebraska State Board of Education. He can be reached at the Nebraska Department of Banking & Finance 1526 "K" Street, Lincoln, Nebraska, 68508 mark.quandahl@nebraska.gov 402.471.7121

Ryan Sothan is the Outreach Coordinator in the Nebraska Attorney General's Office where he has statewide responsibility for developing and implementing community-based initiatives for educating Nebraskans in the areas of consumer fraud, elder financial abuse, predatory and illegal business practices, identity theft, and Internet safety. Educational outreach services are extended to 25,000 Nebraskans annually through presentations delivered to groups large and small and through information booth at numerous expositions and fairs including Nebraska State Fair and Husker Harvest Days. Ryan graduated from the University of Nebraska-Lincoln with a Bachelor of Science in Business Administration.

Amy Hochstetler is a program specialist with the State Unit on Aging, her main job duties include oversight of the Older Americans Act program management for supportive services and caregivers. Prior to joining the State Unit on Aging, she worked for Dell in their global services division. As a team lead for outsourced service desk support, she oversaw teams across time zones and developed policies that impacted customers such as non-profit hospitals, nationwide enterprises, and the U.S. Department of Education.

Lea Wroblewski is a graduate of Creighton University School of Law. Lea's entire career has been at Legal Aid. She began with Legal Aid of Western Nebraska in 1997 and became the Legal Aid Consumer Law Expert in 2001 when she moved to Lincoln, Nebraska. Lea is currently the Managing Attorney of the Access to Justice Center in the Lincoln Office which is a walk-in self-help clinic for low income Nebraskans. Lea is a member of the Lincoln Homeless Coalition and a board member of the Nebraska Financial Education Coalition.

REGISTRATION FORM

Fundamentals of Protecting Seniors from Financial Exploitation

Wednesday, June 22, 2016

Please Check One:

- I will attend this training via web-based Live Streaming at the location checked below.
(Note: Lincoln location is traditional classroom set up with presenters)
- I will attend this training via web-based Live Streaming using my personal computer.
Login details will be sent prior to the training to registered participants and posted at:

<http://www.dhhs.ne.gov/agingtraining>

Please complete a separate form for each individual attending and send it in by June 15.

Name (Please print clearly): _____

Organization: _____

Mailing Address (Street, City, State & Zip): _____

Day Phone: _____ Email (Required): _____

Yes, I would like Continuing Education (CE) Credit

CE credits are provided by Methodist College Professional Development, for Nurses, Social Workers and Nursing Home Administrator 6.0 CE credits. Professionals of assorted disciplines – verify with your certification board 6.0 clock hours. Request CE prior to the training at: [6-22 CE Registration Link](#)

CE credit will be provided only if you attend in Lincoln or at one of the sites listed below.

Additional questions about CE credit, contact Methodist College Professional Development at: tara.millerdonohue@methodistcollege.edu or 402-354-7107

Yes, I would like Continuing Legal Education (CLE) Credits

The program has been approved for CLE credit. The online MCLE system must be used to report attendance. Total CLE hours approved: 6.25 hours of Nebraska MCLE credit.

Activity Number for Regular/Traditional Class (Lincoln attendees only) 120653: 6.25 hours of Nebraska MCLE credit.
Activity Number for Distance Learning Class (Live Streaming on own computer or local sites) 120651: 6.25 hours of Nebraska MCLE credit. Please direct questions related to CLE to the MCLE Commission.

Please check location you plan to attend where training can be viewed via live streaming:

- Beatrice Chadron Columbus Grand Island Hastings Kearney
 Lincoln (classroom with presenters) Norfolk North Platte Omaha
 Scottsbluff Sidney
- I plan to participate using my computer.

ATTENDANCE IS FREE

Multiple ways to register:

Online at: <http://www.dhhs.ne.gov/agingtraining>, Mail, Fax, or Email the Registration Form to:

DHHS, Medicaid & Long-Term Care Division, State Unit on Aging

Attn: Madhavi Bhadbhade
P.O. Box 95026; Lincoln, NE 68509-5026



Fax: 402-471-4619

For questions about the program, cancellation, or walk-in registration, call:

402-471-2309 or 402-471-9700

madhavi.bhadbhade@nebraska.gov

or katie.weidner@nebraska.gov