



Speakers: Carolyn Rosenblatt and Dr. Mikol Davis from Aging Investor.com

Are you worried or concerned about your aging clients?

What if their memory problem is really the early signs of developing dementia?

Do you know how to spot the red flags of diminished financial capacity, and, most importantly, what to do if you see them?

Get some clear, straightforward answers from a unique nurse-lawyer, psychologist team at AgingInvestor.com.

This husband and wife duo has the aging expertise, the practical “what to do next” approach and recommendations about how you can protect yourself as well as your aging client.

A client with diminished capacity is a vulnerable client.

You as the financial professional need to know what to do to maintain your client's financial safety and protect your practice.

If financial abuse of senior investors concerns you, use the 75+ years of combined professional experience of the principals of AgingInvestor.com to help you with prevention strategies.

Biographical Information

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Carolyn Rosenblatt has over 45 years of experience in her combined professions of nursing and legal

practice. She has worked extensively with geriatrics and legal issues of aging. She and her husband, psychologist Dr. Mikol Davis, founded AgingParents.com, a resource for families, located in San Rafael, CA. Together, they provide expert advice, family meetings, and guidance for those struggling with problems related to aging loved ones. They also founded AgingInvestor.com, a consulting and education source for the financial services industry about aging clients, and best practices for managing cognitively impaired senior investors.

Ms. Rosenblatt blogs weekly for *Aging Parents*, on **Forbes.com**. She is published in national legal and nursing journals on the legal aspects of caregiving, resolving family conflict, and the healthcare issues of aging. She also is a strong advocate for healthy aging and leads by example in fitness to maintain health. Ms. Rosenblatt is a frequent speaker for organizations, care facilities and industry groups.

She is the author of ***The Boomer's Guide to Aging Parents***, help for those who are taking on the caregiver role in their lives. She is quoted in numerous publications including the *Wall Street Journal* and *PBS Next Avenue* blog.

Dr. MIKOL DAVIS, Ed. D, Clinical Psychologist,
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Dr. Davis is a clinical psychologist and gerontologist with 40 years of experience in mental health & telemedicine.. He has a particular interest in elders and the issues of aging as it affects families. He evaluates elders for capacity for decision-making and is skilled in assessing and diagnosing dementia and financial capacity in those with cognitive impairment.

He provides individual counseling, family meetings in person and by phone or telemedicine, and helps resolve family disputes about aging loved ones. He also offers consulting packages for those going into retirement, to aid in a mentally healthy transition and a satisfying next phase of life.

He has expertise in intergenerational issues involving businesses, wealth transfer and difficulties with communication among family members.

Dr. Davis creates and produces information products for caregivers and facilities. He is also a frequent speaker on how to reduce stress in those caring for elders and mental wellness in retirement. Dr. Davis blogs at ***blog.agingparents.com, drmikol.com, preventivegerontologist.com, and aginginvestor.com***

Books by Carolyn Rosenblatt:

The Boomers Guide To Aging Parents, The Complete Guide, 2009, Amazon Books

Guide to Managing Aging Clients, American Bar Association, June, 2015

The Family Guide To Aging Parents, Answers to your legal, financial, and healthcare questions, Familius press, April, 2015

Ms. Rosenblatt quoted in:

AARP Bulletin:

“Who’s Helping Your Parents?” September 28, 2009

Forbes.com, Janet Novak, Bureau Chief, , *“New Online Services Could Help Elders Manage Money, Avoid Financial Abuse”* Aug 2014.

NextAvenue.org/blog. Richard Eisenberg, *“Can You Afford Your Parents’ Longer Lives? 6 tips for the fear buried inside many boomers.”*

Wall Street Journal, *“Are You on the Hook for Mom’s Nursing-Home Bill?”* June 2012

Video produced by speakers:

Families At War, Award winning Video produced for the American Bar Association on alternative ways to resolve family-elder disputes. YouTube.

Blogs: *“Aging Parents,”* **Forbes.com**, September 2010 to present

Radio:

Goldstein on Gelt show on Israel National Radio Click on the "iTunes" icon at www.GoldsteinOnGelt.com, January 2015

NPR Radio, All Thing Considered, “Talking To Your

Parents About Money”, May 19, 2011

Mike Bonocorsi Radio Show, April 24, 2013, “How To Know If Your Aging Parents Are Losing It”

TV:

KRON TV October 2009, "Caring for an aging parent, how to prepare and be financially aware"

Local Cable Access of Marin, "Caring for yourself while caring for you aging loved ones." 2013

Prior Presentations:

"Successful Aging", Marin County Psychological Association, May 2012, Larkspur, CA

"The Grey Zone Measuring Capacity for Making Financial Decisions", Marin County Section on Aging, August, 2012, San Rafael, CA

"Enriching Our Understanding of Communication With Aging Clients About Wealth Transfer", Institute For Preparing Heirs, Pepperdine University, February 2012, Malibu, CA

"Decisions, Decisions, The Complexities of Cognitive Impairment", California Assisted Living Assn., June 2012, Santa Clara, CA

"Managing The Grey Zone: Partially

Incapacitated Elders”, Professional Fiduciary Association of California, April 2012 Convention, Monterey, CA

“The \$4 million Rip-off: Is Anyone Paying Attention?”
Tiburon Public Library, February 2013, Tiburon, CA

“Protecting Yourself As A Financial Planner For Aging Clients”, Northern California Financial Planning Assn., May 2012, Napa, CA

"Are They Losing It? How Financial Planners Can Tell If A Client Can Make Decisions”, Financial Planning Assn. of Napa Valley, May 2012, Napa, CA

“The Grey Zone of Financial Capacity, When it’s Neither Black Nor White”, National Academy Of Elder Law Attorneys, April 2012, San Francisco, CA

“Using Mediation to Resolve Conflicts” of American Society of Aging and NCOA, March, 2010, Chicago, Ill.

“How to Be an Advocate Without Being a Pain”, Northern California Chapter, Alzheimer’s Association, November 2011, Napa, CA.

“Taking Emotional Control in Caring for

Aging Parents”, Morgan Stanley, Client University, 2011, Pasadena, CA

Ten Things We Can Do Now To Deal Wisely With Aging Parents, Morgan Stanley, Women and Wealth Conference, February 2011, Walnut Creek, CA.

“Are You a Dangerous Driver? How to Decide, What to Do,” Winchime Assisted Living, November 2010, Marin County CA.

“Our Aging Loved Ones, the Legal Issues Everyone Should Know”, Accredited continuing education for The American Association of Nurse Attorneys’, March 2009, Oakland, CA

List of Proposed Speaking Topics:

Protect Your Practice: How An Advisor Lost An \$8M Client And How to Keep It From Happening To You

Protect Your Practice: Know What To Do With Your Cognitively Impaired Client

If Your Aging Client Is "Losing It", Are You Obligated To Act?

The Grey Zone of Partially Incapacitated Clients: Where Do You Draw The Line?

Taking On The Privacy Issue With Clients Who Have Diminished Capacity

Do You Really Understand Financial Capacity? It's More Complicated Than You Might Think!

The Unique Financial Needs of The Aging Investor: Have You Planned For Incapacity?

A Clear Path Forward: Standardizing The Response To Aging Investors Living Longer Than They Expected



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