

Annual

No Excuse for Elder Abuse

Training

Elder & Dependent Adult Abuse
Prevention Council of San Luis Obispo County
presents

26th Annual One Day Training Conference



**Monday
May 21, 2018**

8:30 a.m. – 4:00 p.m.
Sign-in starts at 8:00 a.m.

Veterans Memorial Building
801 Grand Ave.
San Luis Obispo, CA

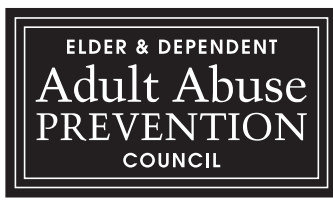
AGENDA

- 8:00** Registration and Continental Breakfast
- 8:45** Welcome, Introductions and Overview
Nicole Pazdan, Co-Chair Elder & Dependent Adult Abuse Prevention Council of San Luis Obispo
- 9:00** ***A View of Elder Abuse***
Paul Greenwood, Deputy District Attorney V
Office of the District Attorney, County of San Diego
- Noon** Lunch
- 1:00** ***Romance Scams***
Debbie Deem, FBI Victim Specialist
- 2:45** ***Preventing Financial Abuse***
Lisa A. Lambert, Esq., CTFA, Vice President & Senior Wealth Advisor, Rabobank
- 4:00** Closing Remarks & Evaluation

SPECIAL THANKS TO:

County of San Luis Obispo
Debra Ermac Consulting
Dignity Health
Jaffa Cafe

Hospice of San Luis Obispo, Inc.
Rock Steady Boxing
Raffle Ladies
San Luis Obispo County Bar Association



Area Agency on
Aging | San Luis Obispo and Santa Barbara Counties

This seminar is supported by grants from the Area Agency on Aging



The mission of the Abuse Prevention Council is to prevent elder and dependent adult abuse and to develop comprehensive and collaborative community response to abuse in San Luis Obispo County.

Speaker Bios

Paul Greenwood

Mr. Greenwood serves as the Deputy District Attorney V, Office of the District Attorney, County of San Diego. He has served as the Head of the Elder Abuse Prosecution Unit since January 1996. He has served as a prosecutor since March, 1993.

Mr. Greenwood has been involved in the prosecution of over 500 felony cases of elder and dependent adult abuse, both physical and financial. He prosecuted nine murder cases and in seven of them obtained a first degree murder conviction in the past 8 years. Mr. Greenwood began his career as a barrister and then a solicitor of the Supreme Court of England and Wales from 1981 to 1991. He served as a legal consultant to the BBC.

Mr. Greenwood assisted with drafting Elder Abuse legislation for California Evidence Code sections 1380 and 1109. He serves as the Co-Chair of California's DA Elder Abuse Committee. San Diego DA's Elder Abuse Prosecution Unit was awarded the California State Association of Counties' Challenge Award for innovation and creativity in 1998.

Mr. Greenwood was a presenter at the first International Conference of Elder Abuse held in Toronto, Canada in March, 1998. He testified before the U.S. Senate Special Committee on Aging in June 2001, July 2007 & November 2012. He is an instructor with the California District Attorneys Association (CDA); the National District Attorneys Association, and the American Prosecutors Institute. He has also been featured on both CBS's "Eye on America" and NBC's "Nightly News".

Mr. Greenwood's awards include: 2005 "Visionary for Change" Award in October 2005 at the Dementia Care Conference, San Diego, 2006 San Diego County Bar Association Public Service Attorney award, 2007 Professional Leadership Award by Elder Financial Protection Network, special recognition in 2008 by San Diego County Bar Association for "commitment to civility

and integrity", and named as one of the "Lawyers of the Year" by the *California Lawyer* magazine in December 1999.

Mr. Greenwood was awarded the Edwin H. Sutherland award in 2009 for outstanding service to the public and the anti-fraud profession. He was the recipient of the National Adult Protective Services Award in Nov. 2010 for "collaboration & leadership in the prosecutorial field." He was Inducted into Elder Rights Advocacy Hall of Fame in 2011 by National Association of Legal Services Developers. He was a speaker at inaugural session of Elder Justice Council in Washington DC.

Debbie Deem

Debbie Deem is a Federal Bureau of Investigation (FBI) Victim Specialist in Los Angeles. She works with victims of both financial and violent federal crimes under investigation by the FBI. In regards to financial crime victims, Ms. Deem works extensively with victims of investment, mortgage, health care fraud and Internet crimes; identity theft; and mass-marketing crimes, particularly those that target older adults. She also serves businesses and nonprofit organizations that have been victimized by fraud-related crimes. She recently initiated a Central Coast Stop Scams and SCAMS LA Working Group to work on issues related to reporting and creating capacity in services to older victims of international fraud schemes such as romance and lottery crimes.

Ms. Deem has worked with federal and local crime victims for almost 30 years. She previously served as a Victim Witness Coordinator for the U.S. Attorney's Offices in San Francisco and Los Angeles, California, initiating both of those programs. She previously worked in District Attorney or County Victim Assistance Programs in Anchorage, Albuquerque and San Jose, CA.

She also has provided training and consultation at the federal level for more than 20 years, including work with the OVC Training and Technical Assistance Center (TTAC) to help develop curricula, on various topics

including financial crime, Identity Theft Victim Assistance Online training, and to provide training on identity theft issues. She has provided presentations and trainings on financial crime victimization at the local, state, national, as well as internationally. Ms. Deem has authored articles related to victims of financial crime and coauthored a chapter on victims of financial crime in the third and fourth edition of *Victims of Crime*. She was also part of the development advisory team who worked on *Taking Action: An Advocates Guide to Assisting Victims of Financial Fraud*, produced by the National Center For Victims of Crime, FINRA and the FINRA Investor Education Foundation.

Lisa A. Lambert, Esq., CTFA

Lisa Lambert is a licensed attorney and works as a Wealth Advisor for Rabobank. She is responsible for assisting client in defining their investment, legal and tax needs in order to produce practical and tax-efficient solutions that meet their financial goals. She brings a broad range of fiduciary and complex estate planning experience to her holistic wealth planning approach. She uses guided discovery to help her clients define their financial. Retirement, wealth transfer and charitable goals, oftentimes navigating multi-faceted family dynamics and intergenerational issues.

As an attorney, Lisa practiced in the areas of estate planning, real estate and business law, followed by a tenure as a Senior Trust Officer with Wells Fargo wealth management group. Her educational background includes a Bachelor's Degree in Social Sciences from US Berkeley and a Juris Doctor degree from the UC-Hastings College of Law. She is a graduate of the Institute of Certified Bankers National Trust School and is a Certified Trust and Financial Advisor (CTFA). She is a member of the California Bar and the San Luis Obispo County Associations. She is also the former President of the San Joaquin Valley Planned Gifts Council.