



# Agenda

## SENIOR IDENTITY THEFT

A Problem in This Day and Age



05.07.13

9:00

### Welcoming Remarks

**Chairwoman Edith Ramirez**

Federal Trade Commission

9:15

### Panel 1: Tax & Government Benefits Identity Theft

This panel will explore tax and benefits identity theft among older Americans. Senior citizens are particularly vulnerable to this crime because their personal information may be easily accessible by numerous individuals. Panelists will examine the scope of the problem; what caregivers and support professionals can do to prevent it; and steps to remedy it. Finally, the panelists will discuss the unique identity theft challenges to seniors as the government moves to deliver benefits through prepaid, reloadable debit cards.

#### MODERATOR

**Steven Toporoff**

Federal Trade Commission

#### PANELISTS

**Amber Smith**

Internal Revenue Service  
Office of Privacy and Information  
Protection

**Christopher Lee**

Internal Revenue Service  
Taxpayer Advocate Service

**David Lindner**

Social Security Administration  
Office of Privacy and Disclosure

**Susan Morgenstern**

Legal Aid Society of Cleveland

**Robert Kerr**

National Association of Enrolled  
Agents (NAEA)

**John Morton**

Green Dot Corporation

**10:45 Break**

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**11:00 Panel 2: Medical Identity Theft**

Panelists from the government, the private sector, and advocacy groups will discuss seniors' vulnerability to identity theft in the health care arena. The panelists also will consider the impact of new laws related to the issue, as well as best practices for seniors and their advocates to detect, prevent, and remedy medical identity theft.

**MODERATOR**

**Megan Cox**  
Federal Trade Commission

**PANELISTS**

**Pam Dixon**  
World Privacy Forum

**Andy McKee**  
U.S. Department of Health and  
Human Services  
Office of Inspector General

**Rick Kam**  
ID Experts

**Robin M. Slade**  
Medical Identity Fraud Alliance

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**12:15 Lunch – on your own**

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1:30

### Panel 3: Identity Theft in Long-term Care

This panel will explore senior identity theft in the long-term care context, including nursing homes, assisted living, and in-home care. Senior citizens in long-term care are at risk of identity theft because their personal information is readily accessible by numerous individuals. Panelists will examine the scope of the problem; what caregivers and support professionals can do to prevent identity theft in long-term care; the challenges of assisting seniors with diminished capacity; steps to remedy identity theft; and possible solutions.

#### MODERATOR

**Lisa Weintraub Schifferle**

Federal Trade Commission

#### PANELISTS

**Lori Stiegel**

American Bar Association  
Commission on Law and Aging

**Becky Kurtz**

U.S. Department of Health and  
Human Services  
Long-term Care Ombudsman  
Programs

**Naomi Karp**

Consumer Financial Protection  
Bureau  
Office for Older Americans

**Neal Walters**

AARP

**Sarah Wells**

Consumer Voice

2:45

Break

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**3:00**

## **Panel 4: Reaching Older Consumers**

This panel will discuss how to reach consumers ages 65 and older with educational messages. As a massive and growing demographic, older consumers are frequent targets of marketers and educators alike. But how can we find this audience, get our messages in front of them, and convince them to listen – and even act? Are approaches different for different segments of the older population? What about when older consumers aren't actively seeking the information – and might not really want it? Panelists will share experiences and ideas about best practices to reach older consumers with educational messages. Audience participation is encouraged.

### **MODERATOR:**

**Jennifer Leach**

Federal Trade Commission

### **PANELISTS:**

**Elinor Ginzler**

Jewish Council for the Aging of  
Greater Washington  
Center for Supportive Services

**Teresa A. Keenan, Ph.D.**

AARP

**Aaron Tax**

Services and Advocacy for GLBT  
Elders (SAGE) and The Diverse  
Elders Coalition

**Andrew Tuck, Ph.D.**

Applied Research & Consulting

**Erin Van der Bellen**

WUSA-9

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**4:15**

## **Concluding Remarks**

**Charles A. Harwood**

Acting Director  
Bureau of Consumer Protection  
Federal Trade Commission

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**4:30**

## **Adjourn**

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## **SENIOR IDENTITY THEFT**

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