

***Aging, Caregiving, & Financial Costs  
Finding Resources & Improving the Pathways Forward***

**April 10, 2024**

**Agenda**

**2:00 - 2:05pm**

**Welcome and Introductions**

- Cindy Hounsell, President, Women's Institute for a Secure Retirement (WISER)

**2:05 – 2:45pm**

**Lightening Rounds – The financial impact of caregiving**

Introduction to Panel by Alane Dent, TruStage

- **Longevity Report: Increasing Age Has Increased Need for Family Caregiving**  
Anne Ollen, TIAA Institute
- **Financial Literacy Needs for Older Women**  
Amy Hinojosa, MANA, A National Latina Organization
- **Key Challenges & Issues for Specialist Caregivers: partner/spouse caregiver, adult child is caring for parent, and solo agers/never married as care recipients.**  
Anna Rappaport, Society of Actuaries
- **Advising Families**  
Mitch Falter, Financial Planner at ReFrame Wealth

**2:45 – 3:25pm**

**Lightening Rounds – Other financial issues affecting older women**

Introduction to Panel by Lisa Schifferle, CFPB

- **Identifying Employer Benefits - Flexible Scheduling, Unpaid Leave, Paid Family Medical Leave; Mental/Behavioral Health Coverage; Employer Resource Groups; Reducing from full-time to part-time; Options job sharing/reduced workload**  
Bridget Bearden, EBRI
- **Financial Costs of Caregiving – Legal Documents, Family Care Documents, and WISER Financial Caregiving Hub**  
Laurel Beedon, PhD, WISER
- **Debt & Scams**  
Genevieve Waterman, National Council on Aging
- **Caregiving Policy & Legislation**  
Michael Wittke, National Alliance for Caregiving

**3:25 – 3:30pm**

**Wrap-up by Deborah Royster**

Highlight of CFPB Resources