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