

PHILIP C MARSHALL  
508.951.8562 • [PHILIPCMARSHALL@GMAIL.COM](mailto:PHILIPCMARSHALL@GMAIL.COM)  
[HTTP://BEYONDBROOKE.ORG](http://BEYONDBROOKE.ORG)

## Elder Justice

### *Affiliations and projects*

[American Bar Association](#), The Epidemic of Elder Financial Exploitation: Ethical Traps for Lawyers and Skills Every Lawyer Needs, CLE Showcase Program, American Bar Association, 2014 Annual Meeting, Boston, MA. (Meeting launched the [Elder Investment Fraud and Financial Exploitation \(EIFFE\) Prevention Program](#), in conjunction with the [Investor Protection Trust](#), and others). August 9, 2014. Guest participant.

[National Adult Protective Services Association](#) (NAPSA), National Advisory Board on Elder Financial Exploitation. Member, 2011 to present.

[National Center for Victims of Crime](#) (NCVC), Elder Financial Exploitation National Roundtable, NCVC, hosted by the American Bar Association, Washington, DC. November 18-19, 2014.

[National Guardianship Association](#) (NGA), Public Policy Committee, 2015 to present.

National Institute for Elder Financial Exploitation ([NAPSA](#)), Advisory Board; Task Force on Charter, Mission, and Vision.

### *Publications and testimony*

[Comments on the proposed rule — Medicare and Medicaid Programs: Revisions to Requirements for Discharge Planning for Hospitals, Critical Access Hospitals, and Home Health Agencies](#), Centers for Medicare Medicaid Services (CMS), Department of Health and Human Services (HHS). Submitted to Andrew M. Slavitt, Acting Administrator, January 4, 2016.

[Marshall, Philip. Beyond Brooke: Brooke Astor and the Cause of Elder Justice](#). (PDF file) *Bifocal: A Journal of the Commission on Law and Aging*, Vol. 36, No. 3, January–February 2015, pp. 67-71.

[Lessons from the Astor Elder Abuse Case](#), New York City Elder Abuse Center, February 16, 2015.

## *Engagements*

2015 ChangeAGents Conference, [Hartford Change AGents Initiative](#), John A. Hartford Foundation. Philadelphia, PA. December 1-3, 2015. Participant.

Meeting in the Middle: The Vital Partnerships of Financial Institutions and Aging Experts to Prevent Fraud and Empower Financial Caregivers, AARP Roundtable, [AARP](#). Hosted by [The Pew Charitable Trusts](#). Washington, DC. November 12

The Brooke Astor Story: Hard-learned Lessons that Inform Elder Justice. [National Guardianship Association, 2015 National Conference](#), Mesa, AZ. October 25, 2015. Keynote speaker, [presentation](#) (Powerpoint, 26 mb; additional reading in 'notes.')

[Senior Investors Forum](#), Securities Industry and Financial Markets Association ([SIFMA](#)), October 13, 2015. Invited attendee.

8th Annual Crimes Against the Elderly Conference, Adult Protective Services, [Texas Department of Family and Protective Services](#), El Paso, TX. October 6, 2015. Keynote speaker.

The Intersection of APS and Guardianship: Working Together for Positive Outcomes. [National Adult Protective Services Association, Annual Conference](#), Orlando, FL. October 1, 2015. Co-presenter.

2015 White House Elder Justice Forum ([White House Conference on Aging](#)), Washington, DC. June 16, 2015. Participant.

[How a Systems-Based Approach to Elder Justice and Big-Data Analytics will Help Arrest of and Response to Elder Financial Exploitation](#)(PDF file). [First Global Summit, World Elder Abuse Awareness Day](#), 10th Anniversary. Convening institutions: National Adult Protective Services Association (NAPSA), National Center for Victims of Crime (NCVC), International Network for the Prevention of Elder Abuse (INPEA). Hosted by the U.S. Securities Exchange Commission, Washington, DC. June 15, 2015. Speaker.

[Second Annual Elder Abuse Awareness Conference](#) (PDF file). Public Guardianship Program, [Howard County Office on Aging](#). Columbia, Maryland. June 12, 2015. Keynote speaker; panelist on Guardianship, Powers of Attorney and Mental Capacity.

[White House Conference on Aging](#), Boston Regional Forum ([video](#) of morning session), John F. Kenney Library, May 28, 2015. Participant.

When Elder Abuse Hits Home, it Hurts: The Brooke Astor Case. Solutions:

Pennsylvania Ombudsman and Protective Services Annual Conference, Division of Protective Services, Bureau of Advocacy, [Pennsylvania Department of Aging](#). April 14-15, 2015. Plenary speaker.

Elder Financial Abuse in the Family: The Brooke Astor Case. [North Dakota Adult Guardianship / Elder Justice Symposium](#), [North Dakota Supreme Court](#), Bismarck, ND. March 11-12, 2015. Plenary speaker.

[Broken Trust: Combating Financial Exploitation of Vulnerable Seniors](#), U.S. Senate Special Committee on Aging, [testimony](#) (video: cue to 26:15 minutes , ends at 34:06). February 4, 2015

The Case of the Legendary Philanthropist Brooke Astor: Capacity v. Greed. [Conference of Chief Justices \(CCJ\)](#) and [Conference of State Court Administrators \(COSCA\)](#), Annual Meeting, White Sulphur Springs, WV. "The Silver Tsunami: The Effects of an Aging Population on State Courts." Education session; July 20, 2014. Panelist.

[National Center for Victims of Crime \(NCVC\)](#)

Elder Financial Abuse in the Family: The Brooke Astor case, NCVC, The National Crime Victim Bar Association, NCVC, Miami, FL. September 18, 2014. Plenary presenter, panelist.

Texas Elder Financial Exploitation Summit, sponsored by the Houston Financial Abuse Specialist Team. Better Business Bureau Education Foundation, [Better Business Bureau of Greater Houston and South Texas](#), Houston, TX. August 3, 2012.

[National College of Probate Judges \(NCPJ\)](#)

[Isabella Horton Grant Guardianship Award](#) ("The Isabella"), recipient (shared with Annette de la Renta). Spring Conference, Tucson, AZ. May 4, 2012.

[National Adult Protective Services Association \(NAPSA\)](#)

The Brooke Astor Story: Hard-learned Lessons that Inform Elder Justice, 2011 Second National Elder Financial Exploitation Summit, annual conference, NAPSA, Buffalo, NY, September 23, 2011. Keynote speaker.

Call to Action 2011, [Elder Financial Protection Network \(EFPN\)](#), San Francisco, CA, March 31, 2011. Honorary chair, board of advisors, speaker with Mickey Rooney.

[Justice for All: Ending Elder Abuse, Neglect and Financial Exploitation](#), Special Committee on Aging, U.S. Senate. Hearing, March 2, 2011. Written testimony submitted for the record. March 16, 2011.

Family Perspective on Elder Abuse, 2010 New York State Elder Abuse Summit (Lifespan), Albany, NY. November 16, 2010. Presenter.

The Astor Case, 2010 Fall Conference, National College of Probate Judges, Charleston, SC. November 8, 2010. Presenter and panelist.

Call to Action 2010, Elder Financial Protection Network (EFPN), San Francisco, CA. March 25, 2010. Keynote speaker.

*Award*

Isabella Horton Grant Guardianship Award ("The Isabella"), recipient (together with Annette de la Renta), National College of Probate Judges, Spring Conference, Tucson, AZ. May 4, 2012.