Aging Investor.com

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AgingInvestor.com® is a nurse-attorney, psychologist team with subject matter expertise in aging, dedicated to helping financial professionals manage their aging clients with the highest level of skill. We offer live presentations on these and many other related topics and accredited CE online courses available at AgingInvestor.com

Presentation Topics for Professionals (sample list)

- The Silver Tsunami- Be Ready For the Wave of Aging Clients
- How To Recognize, Document and Address Diminished Capacity
- What You Can Do To Spot, Prevent and Stop Financial Elder Abuse
- Know Your Client--Do You Have To Deal With Their Families Too?
- Reversing the Failure Rate of Intergenerational Wealth Transfers
- Know Your Fiduciary Responsibility With Cognitively Impaired Clients
- Retirement Planning Traps: Hidden Truths About Long Term Care

These presentations have been done for National Association of Personal Financial Planners, Morgan Stanley, Raymond James, First Republic Bank, Institute for Preparing Heirs, California State Bar Estate and Tax Section, Marin County Bar Assn., Section on Aging, Estate Planning Council and Ivy Funds, among others.

Presentation Topics for Clients, Client and Public Education Programs

- Having the Conversation About Finances With Aging Loved Ones
- Considerations For Long Term Care: Costs, Consumer Choices
- Older Drivers: When Is It Time To Give Up the Keys?
- What Every Adult Child Should Discuss About The Future With Aging Parents
- How To Protect Aging Parents From Financial Abuse
- Everything You Ever Wanted To Know About A Power of Attorney
- Strategies For Taking The Reins When Your Aging Parent Is Impaired

We have done client education and public education presentations for The Alzheimer's Association, Black Rock, Morgan Stanley, Franklin Templeton Investments, six assisted living facilities, public libraries, local banks, nursing and social service organizations and psychological associations among others.

Biographical information, Carolyn Rosenblatt

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Carolyn Rosenblatt has over 45 years of experience in her combined professions of nursing and legal practice. She has a B.S. in nursing. and J.D. degree from the University of San Francisco. She has expertise in aging issues and serves as a consultant and conflict resolution specialist. She has worked extensively with geriatrics and legal issues of aging. Together with her husband, psychologist Dr. Mikol Davis, she founded AgingParents.com, a resource for families, located in San Rafael, CA. Together, they provide expert advice, family meetings, and information products for those struggling with problems related to aging loved ones. They also founded AgingInvestor.com, an education resource for the financial services industry about aging clients, diminished capacity and financial decisions. They are particularly interested in preventing elder abuse. Their consulting practice includes one-on-one advice, roundtable problem-solving discussions with groups, public speaking, CFP Board accredited online CE courses, books, webinars and live presentations at industry conferences and meetings.

Ms. Rosenblatt blogs weekly at *Aging Parents*, on ***Forbes.com*****.** She is published in national legal and nursing journals on the legal aspects of caregiving, resolving family conflict, elder abuse and the healthcare issues of aging. She also is a strong advocate for healthy aging and leads by example in fitness and athletics. Ms. Rosenblatt is a frequent speaker for organizations, care facilities and professional groups.

She is the author of **The Family Guide to Aging Parents: Answers to Your Legal, Financial and Healthcare Questions** (2015***),*** a help for those who are taking on the caregiver role in their lives. She also authored **Working With Aging Clients, A Guide for Legal, Business and Financial Professionals**, published by the American Bar Association, (2015). She and Dr. Davis co-authored **Succeed With Senior Clients, A Financial Advisor's Guide to Best Practices** (2016).

She is quoted in numerous publications including the *New York Times*, *Wall Street Journal, Money, Financial Planning, Investment News* and *PBS Next Avenue* blog.

Biographical Information, Dr. Mikol S. Davis

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Dr. Mikol Davis, clinical psychologist and gerontologist has over 44 years of experience as a mental health provider. He obtained his doctorate in counseling psychology at the University of San Francisco. He has served all age groups in general clinical practice. In 2008, he began his focus on geriatric clients and co-founded AgingParents.com with his wife, Carolyn Rosenblatt. Together they help families resolve disputes related to aging loved ones.

Dr. Davis has expertise in diminished capacity for decision making in aging adults. He provides evaluations for testamentary capacity, financial decision making capacity and offers treatment for elders with anxiety, depression and other difficulties. He helps clients resolve intergenerational conflicts and communication issues. He has served as an expert witness in court cases involving family issues.

As a co-founder of AgingInvestor.com, he creates online courses and products to assist professionals understanding aging issues and how to best address them, particularly how to approach a client with cognitive decline. He advises professionals on best communication practices with older adult clients. He provides assessment and psychological testing of aging clients who have signs of dementia or other cognitive decline and provides advice about how to manage these issues with older clients.

Dr. Davis and Ms. Rosenblatt work side by side often, doing joint consulting and group presentations as well as collaborating on their writing and course work for professionals. Together, they offer perspectives on aging issues from three vantage points: health, law and psychology.

As of this writing, they have been happily married for 34 years. They have two grown children. Both are advocates for and examples of healthy aging with active lifestyles and stress management skills. Their office is located in northern California, the San Francisco area.