

## Meeting Notes

### Fraud, Scams and Financial Exploitation Subcommittee – Task Force on Preventing and Countering Elder Abuse

March 28, 2024

*This meeting was held via Zoom conference.*

#### **Members in Attendance:**

*Leonard Croft  
Deborah Flory  
Jacke Schroeder  
Hannah McCartan*

*Christina Moore  
Kelly Charles  
Debra Holbrook  
Erik Mathes*

#### **Quick Recap**

As a subcommittee, we discussed the next steps to address the preliminary report and deliberated on how to approach each of our three topics. The subcommittee also discussed the structure and content layout for our report, agreeing to share the document via google drive with everyone so that individually each subcommittee member could add their input to each topic in real time. As the subcommittee chair, Leonard agreed to make the final edits to the shared document for submission. While acknowledging the need for further investigation where necessary for each topic, it was agreed that would happen after the preliminary report.

#### **Summary**

The subcommittee discussed the remaining objectives and identified the areas of focus within each topic using bullet points. Next steps to address the preliminary report and the ways in which we will structure our document were also discussed. We agreed that the document needs to frame our topics with clear problem identification and highlight our recommendations while also tying in the HB1191 Task Force considerations listed below.

- (i) the role of the State;
- (ii) the amount of resources to be expended;
- (iii) ways to provide transparency to the public;
- (iv) funding mechanisms;
- (v) oversight measures; and
- (vi) ways to prosecute elder abuse.

## **Next Steps**

- The team will begin working in the shared document, add their feedback and content for each of the three topics.
- Hannah agreed to do more research on the Disability Rights Maryland program that aids in investigating financial exploitation by representative payees.
- Leonard will finalize the shared document and send the final version to the subcommittee for final approval.
- Leonard will submit a copy of the document to the Task Force Chair on Friday, April 12th.

## **Upcoming Deadlines**

- Each subcommittee member must submit their content in the shared document by Wednesday, April 10<sup>th</sup>. A preliminary draft of each report is to be submitted to the Task Force Chair by Friday, April 12<sup>th</sup>.

## **Next Meeting**

The next meeting date is TBD.