



## 2012 Diminished Capacity & Financial Decision Making Forum AGENDA

The University Club of Washington, DC  
1135 16th Street Northwest  
Washington, DC 20005

### Monday, September 10<sup>th</sup>

*5:30 p.m. Reception*

*6:15 p.m. Presentation and Dinner*

- Introductions
- Presentation on the obstacles faced by practitioners and individuals. (Merrell Bailey)
- Discussion questions

### Tuesday, September 11<sup>th</sup>

*7:30 a.m. Breakfast Buffet*

*8:00 a.m. Welcome (NEFE and CFPB)*

- Defining the Agenda
- Short Introductions

*8:30 a.m. Research Overview (Dan Marson)*

*9:10 a.m. Dinner Question Report Out*

*9:15 a.m. Facilitated Discussion: Session 1*

- What are the greatest needs for consumers?
- How do we create immediate impact?
- What are the key research questions that need answered?
- Other themes that were identified during the dinner discussions

*10:30 a.m. Break (Refreshments available)*

*11:00 a.m. Facilitated Discussion: Session 2*

- Identification of top priorities from presentations and Session 1
- What are the top audiences that need to be reached?
- Creating a White Paper
- Next steps

*12:30 p.m. Wrap Up*

*12:45 p.m. Lunch*

*2:00 p.m. Adjourn*