
SPEAKER BIOGRAPHIES



Mr. Gregory R. Shaw

Director, International and Corporate Relations, International Federation on Ageing (IFA)

Greg Shaw has a science and health administration background and until taking up the position of Director, International and Corporate Relations in June 2003, held senior management positions within the Australian Commonwealth Department Health and Ageing in Australia. Prior to joining the IFA he was the Manager for residential aged and community aged care programs in Western Australia. His long career with the Australian Government included management of the Compliance, Complaint and Accountability Section of the Department, having responsibility for the regulatory regime associated with quality of care and certification programs in both residential and community care services.

His earlier work focused on policy development and program implementation supporting the aged care needs of rural and remote communities throughout northern Australia. An advocate of the aged care needs of marginalized community groups in the 1990s, he worked with many Aboriginal and ethnic communities resulting in the establishment of aged care homes and community aged care services specifically designed and targeted for those communities.

Since joining the IFA Greg Shaw has had responsibility for the development of the Building Capacity in Health Care Programs in Africa, worked closely with the South African Human Rights Commission to establish an older person's forum in that country and in 2010 worked with the Government of Mauritius on the establishment of an Observatory on Ageing.

He represents the IFA at the United Nations, works closely with government and has responsibility for IFA elder abuse initiatives. Elder Abuse initiatives have included the development of educational toolkits targeted towards youth; in 2011 he was responsible for convening an International Forum on Sexual Safety of Older Women and in 2013 will lead a high level meeting to examine issues of financial abuse of Canadian seniors.

In 2013 he has been working with other Civil Society Organizations on the Global Thematic Consultations on Population Dynamics, Post-2015 Development Agenda to ensure the needs of older people are recognized.



Ms. Laura Tamblyn Watts

Representing the Canadian Centre for Elder Law (CCEL)

Laura Tamblyn Watts is a lawyer who focuses on elder law issues, having been called to the BC Bar in 1999. She is a Senior Fellow at the Canadian Centre for Elder Law and, before recently moving to Toronto, its long-time National Director. She is the past chair of the Canadian Bar Association National Elder Law section, a founding member of the NICE network where she currently facilitates the law and aging theme team, an editor of a number of peer reviewed journals including the Journal of Elder Abuse and Neglect and a co-facilitator of the World Study Group on Elder Law. Laura is a law reformer, author, educator, expert witness and media consultant on issues related to elder law. She was named the 2012 Distinguished Fellow in Elder Law at Stetson University Centre of Excellence in Elder Law. Laura is currently pursuing her doctorate and teaching at the University of Toronto on law and aging issues.



Ms. Linda Routledge

Director Consumer Affairs, Canadian Bankers Association

Director, Consumer Affairs with the Canadian Bankers Association responsible for retail consumer policy issues, including privacy, Bank Act consumer protection provisions, complaint resolution, financial abuse and access to basic banking services.

Held a number of roles with CBA related to consumer affairs, consumer education, small business and insurance.

Member of the Canadian Standards Association's Technical Committee on Privacy that developed the CSA Model Privacy Code that forms the basis of the current federal privacy legislation.

Served on the Board of Directors of a not-for-profit credit counseling agency and both provincial and national credit counseling associations.

Recipient of Ontario government's 1990 Consumer Educator of the Year award for contributing to consumer education in Ontario.



Ms. Jane Rooney

Director, Financial Literacy and Consumer Education, Financial Consumer Agency of Canada

Ms. Rooney is the Director, Financial Literacy and Consumer Education at the Financial Consumer Agency of Canada (FCAC). In this role she directs and implements two national, separately funded education programs — one with a focus on financial literacy that helps Canadians increase their financial knowledge and confidence in managing their personal finances; the second on consumer education which aims to increase consumers' knowledge and awareness of financial products and services, as well as their rights and responsibilities in this area.

The innovative approach taken by Ms. Rooney and her financial literacy team earned them a 2010 Public Service Award of Excellence for their development of The City, a Financial Life Skills Resource, a simulated online world that offers an interactive, engaging and fun way for students to learn about money.

Ms. Rooney is a member of a number of committees working on financial literacy within Canada and abroad, including the OECD's International Financial Education Network and the Canadian government's Interdepartmental Committee on Financial Literacy. Since joining FCAC in January 2002, Ms. Rooney has also served as Senior Advisor to the Commissioner, headed the Consumer Education unit and was Manager of Consumer Services at the Agency. Her previous work experience includes almost eight years as a policy analyst at the Canadian Payments Association, the organization that developed and operates the Canadian payments system. In that capacity, Ms. Rooney was a member of a number of Canadian committees that examined payment policy issues.

Ms. Rooney holds a Bachelor of Arts degree in Economics from Carleton University.



Ms. Margaret Easton

President, Meridian Aging Project

Margaret Easton has over thirty years of experience in the financial services industry in banks, trust companies, and credit unions. Her most recent position was as AVP Operations. Margaret holds a BC Instructors Certificate in Adult Education and her EPC, Elder Planning Counselor designation. She also has undergraduate degrees in General Studies and Women's Studies, a Masters of Liberal Studies, is currently completing her Masters in Gerontology, and will be starting a Ph.D. in Liberal studies this fall to study personhood and aging.

Margaret has served as a facilitator at the Federal/Provincial/Territorial Forum on Prevention of Financial Abuse of Seniors in Ottawa 2008, has presented at a number of conferences on aging issues, and is a co-chair of the board of directors for the BC Association of Community Response Networks. She has recently combined her business experience and academic qualifications to form her own company, The Meridian Aging Project which focuses on a variety of aging issues, particularly preventing financial abuse of older adults. She is a 2012 winner of the "Elder Abuse Awareness to Action Award" from the Gerontology Research Centre of SFU in recognition of outstanding contributions made in BC to advancing elder abuse awareness, mitigation and prevention.



Mr. Stephen Alsace

Senior Counsel, CIBC Legal Department

Stephen is Senior Counsel at CIBC Legal Department, and has been with CIBC since 2001. Stephen supports the Personal Banking group, with experience in powers of attorney, estates, records management, fraud, accessibility, lending and anti-money laundering issues.

Stephen sits on a number of industry committees, including a member of Canadian Bankers Association subcommittees and the IFIC Task Force on Electronic Imaging and for Electronic Signatures. Stephen has spoken on a number of occasions to the Canadian Bar Association, Federated Press, IFIC and local law associations on a number of issues, including Powers of Attorney, Financial Abuse, Corporate Governance, Fraud Prevention and Records Management. Stephen regularly sits on numerous risk and operational committees within CIBC, and routinely provides legal support for front line branches on a variety of issues. Stephen has been awarded numerous CIBC achievers awards, including the CEO award in 2004.

Stephen holds an LLB from the University of Windsor, a JD from the University of Detroit-Mercy, as well as a Masters degree in European Integration from the University of Strasbourg, and a Bachelor of Social Sciences (Honours) Degree from the University of Ottawa. Stephen articulated and spent his early legal career with Borden Ladner Gervais, in their Business Advisory Group. Stephen downhill skis, enjoys time with his kids and family, and is an avid lacrosse fan.



Ms. Lauren Bates

Staff Lawyer, Law Commission of Ontario

Lauren Bates has been Staff Lawyer for the Law Commission of Ontario since February 2008. The Staff Lawyer carries out research, coordinates major projects, engages in consultation and supervises researchers. She has been Project Head for the LCO's completed projects on fees for cashing government cheques, the law as it affects older adults, and the law as it affects persons with disabilities. She is the Project Head for the LCO's new project on the law of capacity, decision-making and guardianship.

She was Senior Policy Analyst for the Ontario Human Rights Commission from 2000 to 2008. In that role she conducted research and public consultations, and developed reports and recommendations on such topics as accessibility for persons with disabilities, barriers and supports for family caregivers, and mandatory retirement. She was awarded the Amethyst Award for public service in 2001. Prior to that, she worked in senior positions in the legal and business publishing industry. She has written for numerous publications, mainly in the area of human rights, labour and employment law. She graduated from Osgoode Hall Law School in 1991, and was called to the Bar in 1993, following articles with the Ontario Human Rights Commission.



Ms. Kathleen Cunningham

Manager, Legal and Legislative Projects, Public Guardian and Trustee of BC

Kathleen Cunningham has 25 years' experience in the estate and trust industry. She holds a Masters in Policy Studies from the University of New South Wales in Sydney Australia and joined the office of the Public Guardian and Trustee of BC on a temporary assignment as the Provincial Coordinator, Vulnerable Adult Community Response in 2010. In 2011 she worked with the office to implement the new personal planning legislation. She continues to work on related projects including those with a focus on financial abuse.

Over her career Kathleen has led the policy and risk management department of a large national trust company, developed and delivered education to trust specialists across Canada and spearheaded many industry responses to proposed federal and provincial legislation affecting executors, trustees, and guardians in Canada. She is a frequent speaker to both professional and community groups.

Kathleen is the national chair of the STEP Canada Trust & Estate Technical Committee and is a past Director of the BC Law Institute. Throughout her career she has been an active participant in law reform initiatives in the fields of adult guardianship, powers of attorney and trust law. Most recently, she was a member of the BC Law Institute Committee on the Recommended Practices for Wills Practitioners Relating to Undue Influence. The report was released October 2011.



Constable Patricia Fleischmann

Toronto Police Service

In her 27th year with Toronto Police Service, Constable Fleischmann is the Vulnerable Persons Coordinator (senior, disability and mental health issues). Patricia is a graduate of Durham College, McMaster University and Ryerson University where she wrote on the “Barriers and Challenges of Older Abused or Neglected Adults” in Accessing the Canadian Criminal Justice System. While at Ryerson, she also completed her Gerontology Certificate. Patricia is an international elder abuse educator for police and non-law enforcement audiences. She was a witness at a session of the House of Commons Standing Committee on the Status of Women – Abuse of Older Women Study, November 2011.

Patricia is a founding member of Law Enforcement Agencies Protecting Seniors, an Ontario group committed to sharing information and ideas for the positive treatment of older adults, as well as developing a collaborative, coordinated and effective response to older adult abuse. As a member of LEAPS, she supported the development an elder abuse training video through the Ontario Police Video Training Alliance. Patricia, along with her father, a retired police officer, assisted with a 2011 LEAPS elder abuse training initiative that will soon be posted on the Canadian Police Knowledge Network, an e-learning training forum for law enforcement personnel across the country.

Patricia is a long-time member of Bringing an Awareness of Safe Senior Issues to the Community, a multi-level, multi-jurisdictional governmental and NGO organization responsible for producing a national safe senior calendar. She currently sits as an advisory member on the Board of Directors for the Ontario Network for the Prevention of Elder Abuse. Patricia is, also, the author of two chapters in the 2010 e-book Aging, Ageism and Abuse.

Finally, she is an active social media user for the Toronto Police Service and uses both Facebook (Patricia Fleischmann) and Twitter (@CaringCop) to promote an awareness of abuse and neglect, disability, mental health and general safety issues, primarily as it relates to older adults, including a ‘senior safety tip of the day’ message.



Mr. Douglas Melville

Ombudsman and Chief Executive Officer, Canada’s Ombudsman for Banking Services and Investments (OBSI)

Mr. Melville has been Canada’s Ombudsman for banking and investment disputes since his appointment in 2009.

Mr. Melville is a lawyer by training with over 20 years of financial services experience in a wide variety of institutions and roles. Prior to his financial services career, he worked as a management consultant and policy analyst in Canada, Africa and the Middle East for the Canadian Government and other public sector clients.

An experienced mediator and arbitrator, Mr. Melville earned his BA in Economic Geography & Political Science at Carleton University, followed by a JD and an MBA from Western University. As an Ontario-Jiangsu Scholar, he attended Suzhou University in China and received a Diploma in Foreign Trade Economics. He later earned an LLM in international trade and competition law, specializing in financial services consumer protection, from Osgoode Hall Law School.

An Institute of Corporate Directors-certified Director (ICD.D), Mr. Melville is involved in the governance of several organizations involved in financial literacy, elder care, international development, and the environment.



Ms. Judith Wahl

Executive Director, Advocacy Centre for the Elderly

Judith Wahl is the Executive Director and Senior Lawyer at the Advocacy Centre for the Elderly (ACE), a community legal clinic for low income older adults in Ontario. ACE was the first legal clinic in Canada to specialize in elder law.

Judith is a frequent speaker at local, provincial and national conferences on legal issues and the elderly. She also sits as a member on a variety of committees related to seniors' issues including the Retirement Home Regulatory Authority Stakeholder Advisory Council, the Law Commission of Ontario Capacity and Guardianship Project Advisory Committee, and the Guardianship Advisory Committee at the Office of the Public Guardian and Trustee. She has served as the Chair of the Interim Committee for the Implementation of the Substitute Decisions Act, acted as the Vice Chair of the National Initiative for Care of the Elderly, and also taught Elder Law both at McMaster University and the Faculty of Social Work, University of Toronto.

She was recently awarded a Queen Elizabeth II Diamond Jubilee Medal for her service to seniors in Canada, for her role in establishing the Advocacy Centre for the Elderly, and her role in the development of elder law as an area of practice. She is also the recipient of the Ontario Bar Association Award for Distinguished Service, 2008 and the Osgoode Hall Law School Gold Key Award for Public Service, 2006.



Ms. Ann Soden

Executive Director National Institute of Law, Policy and Aging

Ann Soden, Ad.E. is a Montreal lawyer and mediator practising in the area of Elder Law.

She is the founding President of the National Elder Law Section and Past Chair of the Quebec Elder Law Section, both of the Canadian Bar Association. She heads the National Institute of Law, Policy and Aging (NILPA), based in Montreal, dedicated to research, education and advocacy on issues of law and aging.

Ann offers a clinical course in Elder Law to students of the Faculty of Law of McGill University at NILPA's Centre for Law and Aging, which has, since 2007, served as a pro bono legal clinic for older Quebecers and those who play important roles in the lives of older adults. Ann has taught, since 2010, a Masters of Law course on law, aging and intergenerational issues at the Faculty of Law, Université de Montréal.

Ann's publications include *Advising the Older Client*, published in 2005 (2nd Edition 2013) by Lexis Nexis Canada, the first comparative law text to examine law and aging in Canada, and *Le droit des aînés*, Lexis Nexis Québec 2013, for which she is general editor and one of the authors. Ann is author and co-editor with Dr. Israel Doron, Haifa University, of *Beyond Elder Law: New Directions in Law and Aging*, Springer-Verlag, Germany, 2011, and is the co-author of "A Softly Greying Nation: Law, Ageing and Policy in Canada", *Journal of International Law and Aging*, AARP and Stetson University, College of Law, Publishers, Florida, 2007. Ann was the first international commissioner of the American Bar Association's Commission on Law and Aging in Washington, D.C. (2005 -2008).

She was designated an *avocate émérite* of the Bar of Quebec in 2007 for her contributions to society, to the legal profession and the law through the development of Elder Law.



Ms. Kimberly A. Whaley

Principal, Whaley Estate Litigation

Kimberly A. Whaley is the founder and principal of the Toronto law firm, Whaley Estate Litigation. She is also a solicitor of the Supreme Court of England and Wales. Her practice is restricted to the litigation and mediation of disputes throughout Ontario in the areas of guardianships, end of life decisions, elder law and several others.

Kimberly won many awards and among them the Martindale-Hubbell – BV Distinguished Rating in both Legal Ability and Ethical Standards, the Hoffstein Book Prize Award in 2009 and Queen's University Special Lecturer Award in 2003.

Kimberly was inducted as a Distinguished Fellow of the Canadian Centre for Elder Law in Vancouver in 2012. She was designated as a Certified Specialist in Estates and Trusts Law by the Law Society of Upper Canada in 2006 and was chosen by Lawday Leading Lawyers as one of the top 60 leading lawyers in Canada in Estates and Trusts.

Kimberly is Past-Chair of the OBA Trusts & Estates Executive, and past member of the CLE and Institute Executives. She is currently a member of the CBA Elder Law Section Executive and is on the Expert Advisory Group/Panel for the Law Commission of Ontario's Law Reform Project as it relates to Ontario's Capacity and Guardianship Laws. She is a registered member of the Society of Trusts and Estates Practitioners (STEP) (worldwide) and is on the STEP (Toronto) Executive as Program Chair.

Kimberly has taught as an adjunct professor at Queen's University and the University of Toronto, as well as the Bar Admission Course at Osgoode, and presents at Continuing Legal Education and Professional Development programs for lawyers, in-house financial institutions, ILCO, the Institute of Law Clerks of Ontario, hospitals and other organizations and foundations, universities and colleges. She maintains a teaching affiliation with the University of Toronto and recently taught on the subject of 'Capacity' together with Mark Handelman and Laura Watts in a course on Law and Aging.



Ms. Cynthia Hiebert-Simkin

Partner, Tradition Law LLP Estates and Trusts

Cynthia Hiebert-Simkin is a partner with Tradition Law LLP, Estates and Trusts. Called to the Bar in Manitoba in 1993, Cynthia currently practices in the area of Wills, Estate Planning, Estate Administration and also deals with Elder Law issues on a regular basis. Eight years of family law practice gives her particular insight in estate planning issues for second families

Cynthia is passionate about education and the importance of information in helping people make decisions about their legal rights. She researches and lectures frequently on wills and estates issues, both to the public at large and professionally, nationally and locally. She has lectured nationally for the Canadian Bar Association and provincially for the Law Society of Manitoba, The Manitoba Bar Association, the Faculty of Law and the Manitoba Bar Association as well as for several community organizations. She also sat on national ad hoc committees looking at issues such as health care decision making for incompetent individuals and estate planning issues arising from surrogate parenting situations. Cynthia taught "Wills and Succession" for two years at the Faculty of Law, University of Manitoba.

Cynthia is the chair of the Canadian Bar Association National Wills, Trusts and Estates section. She also is on the Board of Directors of the Jewish Foundation of Manitoba and Women Business Owners of Manitoba.

Cynthia is the chair of the Canadian Bar Association National Wills, Trusts and Estates section. She also is on the Board of Directors of the Jewish Foundation of Manitoba and Women Business Owners of Manitoba.

Married for 20 years to an astoundingly patient man, Cynthia has four children, five grandchildren, and a dog. A quote from André Gide often helps her get through her busy days – “In order to be utterly happy the only thing necessary is to refrain from comparing this moment with other moments in the past.”



Dr. Jane Barratt

Secretary General, International Federation on Ageing

Jane Barratt is the Secretary General of the International Federation on Ageing (IFA) comprising government and non-governmental members in 62 countries and representing some 50 million older people. She brings to this position over 35 years experience in both public and private sectors in the fields of public health, community and aged care, and ageing and disability.

Dr Barratt strives to strengthen the roles and relationships between government, NGOs, academia and industry in order to help shape and influence policy to improve the quality of life of older people. She is a strong contributor to the international dialogue on the social, political, cultural and physical environments that impact on the lives and human rights of older people.

Over many years Jane has lead in organizational management, staff development and the analysis of operations leading to improvements in policies, programs and client outcomes across sectors and disciplines. She is an international speaker and facilitator of some repute, with a flair for thought provoking sessions that call on audiences to take action.

Dr Barratt is a Churchill Fellow, and recently awarded the Queen Elizabeth II Diamond Jubilee Medal in Canada in recognition of her commitment and passion to enhance the understanding of issues relating to ageing and engaging in dialogue with governments and the private sector to improve the quality of life of older people.

She represents the IFA at the United Nations Economic and Social Council and is directly responsible for the formal relations with the Ageing and Life Course Department, World Health Organization. Jane holds adjunct academic positions, executive and board positions on ministerial, government and non-government organizations including Age Macular Degeneration Alliance International and Baycrest which is one the world's premier academic health sciences centers focused on ageing.



Ms. Suzanne Michaud

Senior Advisory Counsel in RBC Law Group

Senior Advisory Counsel in RBC Law Group providing advice on registered plans, incapacity, senior financial abuse, trusts, estates to RBC companies including Royal Bank of Canada and RBC Dominion Securities Inc.

With Pallett Valo, LLP in Mississauga, Ontario for many years in a practice restricted to estate planning and administration. While there, also the national estate planning consultant for Zurich Canada, based in Toronto.

Published numerous articles. Presented at Ontario Bar Association (OBA) and Society of Trust and Estate Practitioners. Conducted over 200 seminars across Canada speaking to lawyers, insurance advisors, financial planners, accountants, employee groups, and financial institution employees and clients.

Volunteer on planned giving with Trillium Health Centre Foundation and YMCA Greater Toronto.



Ms. Jan Hopper

Assistant Corporate Secretary & Chief Privacy Officer, Credit Union Central of Canada (CUCC)

Jan Hopper has been working in the Canadian credit union system for 25 years. Before joining Credit Union Central of Canada (Canadian Central) in 1991, she worked as a Loans Officer at a credit union. Over the years she has worked in various areas including product development, standards and compliance, and policy. Her current position is Assistant Corporate Secretary and Chief Privacy Officer in the Legal and Governance Department.

Officer in the Legal and Governance Department.

Jan has been a staff resource to the national Risk Management Policy Committee for the past 10 years. This Committee oversees the operations of the Credit Union Office for Crime Prevention and Investigation, which is an approved investigative body under the Personal Information Protection and Electronic Documents Act (PIPEDA). This Committee assists Canadian Central in its role as a national trade association to develop model policies and procedures for credit unions to comply with federal legislative requirements such as PIPEDA.

Jan's formal education includes a B.A. in Psychology from York University in Toronto. More recently she has achieved her Canadian Information Privacy Professional Certification (CIPP/C) through the International Association of Privacy Professionals (IAPP).



Mr. Peter J M Lown QC

Director, Alberta Law Reform Institute

Peter Lown has an LL.B. (Honours) from the University of Glasgow and a Masters degree from the University of Saskatchewan. He joined the Faculty of Law and the University of Alberta in 1969. He was admitted to the Alberta Bar in 1973. In 2004 Professor Lown retired from the University and is now Professor Emeritus. He taught Conflicts, Wills, Family Law, Intellectual Property, Communications Law, and Entertainment Law for many years. He has published extensively in the Communications and Corporate areas, among others, and more recently practiced extensively in the cable television and film production areas.

After a year as special counsel to the Alberta Law Reform Institute to report on electronic depositories and transfer of securities, he was appointed Director of the Institute in April 1988 for a term of 5 years and reappointed for further 5 year terms in 1993, 1998, 2003, and 2008. Mr. Lown was retained as Director after his retirement from the University.

Mr. Lown was named a Queen's Counsel in 1994, awarded the CBA, Law Society of Alberta Distinguished Service Award for Service to the Legal Profession in 2001 and the Alberta Centennial Medal in 2005. He is the treasurer of the Commonwealth Association of Law Reform Agencies. He also chairs two of the Uniform Law Conference of Canada's committees – the Advisory Committee on Program Development and Management and the International Committee. In this latter role, he works closely with the Uniform Law Commission in the United States on program planning and specific joint projects such as Recognition of Substitute Decision Making. Most recently he was one of six experts at a conference organised jointly by the European Commission and the Hague Conference on Private International Law on the topic of Access to Foreign Law in Civil and Commercial Matters.

He has worked on judicial projects in Vietnam and the Caribbean, and been instrumental in the creation of law reform agencies in a number of jurisdictions.



Dr. Patricia Hughes

Executive Director, Law Commission of Ontario

Patricia Hughes has been the Executive Director of the Law Commission of Ontario since September 15, 2007, and is an ex-officio member of the LCO Board of Governors. Dr. Hughes' academic career spans more than thirty-five years and she has taught at various Canadian universities, and written extensively in the areas of constitutional law, dispute resolution and feminist legal theories, as well as in administrative law, labour law, law reform and access to justice.

Professional Career:

- Executive Director of Education and Scholar in Residence in the Calgary office of Bennett Jones LLP (2006 – 2007)
- Dean of Law, University of Calgary (2001 – 2006)
- Chair of Women and Law, University of New Brunswick Faculty of Law (1992 – 2001)
- Alternate Chair of the Ontario Pay Equity Hearings Tribunal (1990 – 1992)
- Vice-chair of the Ontario Labour Relations Board (1986 – 1990)
- Counsel at the Ministry of the Attorney General of Ontario (1984 – 1986)
- Has written and spoken on legal aid and access to the legal system and administrative process, as well as on a wide variety of issues in labour law, women's rights and constitutional law