AADMM
American Association of Daily Money Managers

2024 ANNUAL CONFERENCE

NOVEMBER 8-9, 2024
VIRTUALLY

AGENDA

For more information, visit *secure.aadmm.com*

SPEAKERS

Mark Burnette – CPA, CISSP, CISM, CISA, CRISC, CGEIT, QSA
Practice Leader, LBMC Advisory Services

Mark Burnette is the Practice Leader of LBMC's Advisory Services practice, specializing in cybersecurity with over 25 years of experience in information security and risk management. Throughout his career, Mark has held leadership roles at major corporations and consulting firms, building and managing security functions and being recognized as one of the industry's top cybersecurity leaders. He has been honored with awards such as the Information Security Executive of the Year and named one of Information Security Magazine's "Security 7." Mark is also a published author, a TEDx speaker, and a Fellow of the Information Systems Security Association. He currently serves on the American Institute of CPAs' national Cybersecurity Working Group, contributing to the development of cybersecurity standards and training.

Stacy Jo Coffee-Thorne
CEO and Financial Concierge, Freedom Support Solutions LLC

Stacy Jo Coffee-Thorne is the founder and President of Freedom Support Solutions, a daily money management and accounting firm, with over 30 years of bookkeeping experience and a background as a certified paralegal specializing in guardianship, tax, and estate planning. As a Financial Concierge since 2012, Stacy Jo helps manage her clients' finances, and is also a QuickBooks Online ProAdvisor and active member of the Association of Daily Money Managers. In 2021, she founded the Association of Christian Business Women to support women entrepreneurs. Stacy Jo is deeply involved in her community, serving on nonprofit boards like Hearts for Moms and CareBag, and is a certified Life Coach, John Maxwell Team member, and Dave Ramsey Master Coach. Rooted in her Christian faith, she strives to empower others through financial stewardship and community leadership.

Amy Egtvet
Chief Executive Officer, WE Trust Company

Amy Egtvet's professional career began in non-profit and small business administration. Prior to becoming the Chief Executive Officer at WE Trust Company, Amy was a Principal at Ware, Egtvet & Associates for 10 years. She began her career at Missouri Historical Society, worked as an outreach teacher at Pacific Science Center and served as the Executive Director for Hosteling International, Washington State. She has worked extensively in developing budgets, keeping books for small businesses and managing offices. Amy excels at problem solving, detail-oriented tasks, and enjoys assisting individuals and families piece together their unique financial picture. She collaborates with clients, their families, and their advisors including attorneys, accountants, financial planners and geriatric care managers to research and reveal assets and spending patterns so that sound decisions can be made in estate planning and care of the individual.

Kate Granigan
Chief Executive Officer, LifeCare Advocates

Ms. Kate Granigan is a licensed Independent Clinical Social Worker and received her Master's degree in Social Work from Boston College in 1994. She has worked as a clinician in the field of aging for over 25 years. Kate is the CEO of LifeCare Advocates, a team of nurses, social workers, physical and occupational therapists who provide assistance, advocacy and guidance to elders and their families through the maze of aging services while promoting choice, dignity and quality of life. Ms. Granigan has been on many non-profit Boards over her years in the aging field, and is currently the 2024 President of the Aging Life Care Association as well as on the Advisory Board for the Massachusetts Guardianship Association. Ms. Granigan lectures regularly on topics related to aging, caregiving, and elder care.

SPEAKERS

Caitlin Hall
Owner, Organize My Life

Caitlin Hall is the owner of Organize My Life, a company focused on providing expert daily money management and fiduciary services. With over 20 years of experience, she helps high-net-worth individuals, families, older adults, and busy professionals navigate their financial responsibilities with confidence and peace of mind. Caitlin holds an MBA and has a background as a financial advisor, which gives her a unique and well-rounded perspective on managing personal finances. Throughout her career, Caitlin has been an active leader in the financial management community. She served on the Board of Directors of the American Association of Daily Money Managers (AADMM) for six years, founded the Florida Regional Group, and contributed to multiple committees. She continues to stay engaged with the industry as a member of both AADMM and the Professional Fiduciary Council of Florida. When she's not working, Caitlin enjoys spending time with her husband and their two teenage boys in Florida. Whether cheering them on at a baseball game or watching their performances on stage, she takes pride in supporting her family's passions and achievements.

Darby Jones, J.D.
Founder, Professional Fiduciary Services, LLC

Darby Jones is an attorney and member of the Florida and Maryland Bars, with over 15 years of experience as a trust officer before founding Professional Fiduciary Services, LLC in 2011. She offers fiduciary consulting services to guide individuals and families through estate planning and life decisions. Darby also hosts "Aging Academy; Navigating Decisions," a monthly program with AARP Florida, addressing aging-related challenges such as medical events, caregiving, and financial concerns. She is the founding President of the Professional Fiduciary Council of Florida and serves on the Executive Council of the Florida Bar's Real Property Probate and Trust Law Section.

Barb Lyon
Principal, RelyOnB

After a career of leading business and customer operations teams for software and service companies, Barb has taken her passion for helping others to a new frontier as a Daily Money Manager. As with many of us doing this work as 2nd careers, Barb's inspiration came from helping her mother-in-law; and, her own Mom, Dottie, when she was no longer able to track all the details of managing her life and finances. This personal experience was the catalyst for Barb to start helping Seniors who are at that phase in their lives when they need trusted support. Barb also helps clients catalog their assets and organize their physical, financial, and digital lives.

Dan Mangus
Vice President of Growth and Development, Senior Marketing Specialists

Dan started his first insurance agency at 18 and has been passionate about educating others about their insurance choices ever since. Dan served as the President of his local Association of Life Underwriters by age 21 and went on to serve as the area Chairman of the Life Underwriter Training Council. In recent years Dan has taught Medicare courses at universities, state and local association chapters, conducted CE courses, and has been speaking at national insurance conferences throughout his career. In addition to regularly publishing articles in several industry magazines, he is the author of a series of books entitled TalkingMEDICARE.

SPEAKERS

Robert Mayetta
Founder, Smart Daily Administrators

Robert Mayetta has an extensive background in Financial Operations and Organizational Management. He has a degree in Finance and multiple Certifications, including Project Management, Human Resources, is a Certified Daily Money Manager (CDMM) and has a Certification in Fiduciary Management. Prior to Smart Daily Administrators, Robert worked in Financial Services for over 25 years with many of the top financial institutions, holding positions in Strategic Planning, Project Management, and Operational Risk Management in Consumer, Small Business and High Net Worth market segments, He's been a Daily Money Manager for over 15 years. Robert has been an active volunteer and board member for many Non-Profit, Networking and Advocacy Organizations over the years and is currently the President of the American Association of Daily Money Managers for the Greater New York Region.

Mike Moran
Digital Marketing Consultant, Digital Dimensions by WSI

Michael Moran holds a Bachelor of Science in Computer Science from Purdue University and a Master of Science in Technology Commercialization from the University of Texas at Austin. He is also a Certified Information Systems Security Professional (CISSP).

Leah Nichaman
Founder, Everyday Money Management

Leah Nichaman is the founder of Everyday Money Management, the largest daily money management company in the DC metro area, serving over 250 clients with a team of 21 people. A self-proclaimed data enthusiast, Leah started the company to help people, especially those with mental illness, navigate financial management. Her work began at the National Alliance on Mental Illness (NAMI) in Montgomery County, MD, where she saw the challenges individuals with mental illness faced in managing their money. Leah's expertise expanded to helping seniors with cognitive illness and busy professionals with complex finances. She leads Everyday Money Management with a transparent, collaborative, and supportive leadership style. Leah is an active member of the American Association of Daily Money Managers (AADMM), serving as a board member and president, and now volunteers in its mentoring program. She lives in Rockville, MD, with her husband and enjoys the outdoors, birdwatching, reading, and crafting.

Shira Nichaman
Director of Operations, DMM, Berkshire Team Leader and Berkshire Branch Manager

Shira joined Everyday Money Management (EMM) in 2020, bringing over 30 years of experience in operations management and client service, primarily from her time at Christie's auction house in New York City. At EMM, she wears many hats, serving as Director of Operations, Daily Money Manager, Branch Manager, Team Leader, and Tech Teacher. Her passion for managing teams and creating exceptional client experiences drives her work, where she helps clients manage their finances and organize personal information. Shira also applies her skills as a tech expert, continuously improving processes at EMM. Prior to joining EMM, she worked in interior design at Jess Cooney Interiors, blending her love of design and operations. Shira holds a degree in Art History from Tufts University and a master's in American Studies from The George Washington University. She lives in West Stockbridge, MA, with her husband, two daughters, and a variety of pets, including dogs, chickens, koi, and honey bees.

SPEAKERS

Jennifer Pilz
Owner and Founder, Riverside Care Advisors

Jennifer, the owner and founder of Riverside Care Advisors, has nearly 25 years of experience supporting families and their aging loved ones. With a Master’s Degree in Physical Therapy from Simmons College and a Graduate Certificate in Geriatric Care Management from the University of Florida, she is a knowledgeable advocate in elder care. Jennifer has been an Aging Life Care® Advanced Professional member since 2012, is the current President of the Aging Life Care Association's New England Chapter, and has been a Certified Care Manager since 2014. Her dedication and comprehensive understanding of the aging process have made Riverside Care Advisors a trusted resource for families seeking personalized care management to enhance the quality of life for seniors.

Natasha Smith
Principal Care Manager and Educator, Smith Integrated Care Services

Natasha Smith, an Aging Life Care Manager since 2017, brings a diverse background as a former teacher, school administrator, and psychotherapist. An Independent Clinical Social Worker since 2016, she is an Advanced Professional member of the Aging Life Care Association, a Certified Advanced Social Work Case Manager, Certified Dementia Practitioner, and End of Life Doula. Natasha works closely with elders experiencing a loss of autonomy, helping them navigate healthcare management, care transitions, and planning for their future while balancing safety and independence. Committed to education and social justice, she has designed and presented CEU trainings on various care management topics for healthcare professionals.

Shannon Tefft-Janes, MBA
President/Founder, Executor Navigator, LLC

Shannon Tefft-Janes, an MBA graduate from Pennsylvania State University, brings over twenty years of experience in management consulting and business ownership to her role as a Daily Money Manager. With expertise in accounting, bookkeeping, finance, insurance, and project management, she is a member of the American Association of Daily Money Managers (AADMM) and is pursuing her Certified Senior Advisor designation. Shannon developed the innovative "Financial Fortress" model to streamline and secure her clients' financial processes, protecting them from scams and ensuring financial efficiency. She also offers free workshops to teach caregivers and others how to safeguard financial accounts. Shannon emphasizes empowerment, transparency, and efficiency, helping clients navigate their financial journeys with clarity and control.

Jeffrey Wildstein
Principal, Kavod Daily Money Management

Jeffrey Wildstein is the principal of Kavod Daily Money Management, serving clients in the greater Boston area since its founding in August 2021. With a background as a Rabbi, Jeffrey spent fourteen years in congregational leadership, where he managed financial aspects of program operations and counseled hundreds of people with care and respect. His diverse career includes practicing law, serving as a college administrator, working as a political campaign field organizer, and co-authoring a book on Connecticut Tort Law. He holds a B.A. in History from Yale University, a J.D. from Cornell Law School, and was ordained by Hebrew Union College – Jewish Institute of Religion. Additionally, Jeffrey earned a Certificate in Non-Profit Administration from a joint program of Hebrew College and Boston University, and is a Certified National Social Security Advisor. In 2023, he co-chaired the AADMM Conference Committee.

SPEAKERS

Dale Wilsher, PCC
Certified Life & Career Coach, Your Authentic Personality

Dale Wilsher is an executive leadership coach and personal development expert, known for her deep understanding of personality dynamics, authenticity, and mental resilience. As a certified DISC trainer and the author of an acclaimed book on personality, Dale's expertise empowers individuals and organizations to use their purpose to reach their full potential. She has a robust background in sales and science, holds accreditations by the International Coach Federation and National Career Development Association. She is a member of both the National Speakers Association and the Forbes Coaches Council from her hometown of Boulder, Colorado, where she is committed to helping others make the most of their time and talent.

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AGENDA

FRIDAY, NOVEMBER 8, 2024

11:00am-11:05am EST **Welcome & Overview**

11:05am-12:05pm EST

CEU: 1 hour, Standards of Practice

General Session: Understanding Cyber Security Challenges and Enhancing Internet Safety Awareness - Speaker: Mark Burnette

The Internet provides access to lots of good data, useful websites, social media options, and entertainment, but unfortunately, it also poses some risks to the security and privacy of individuals. In this session, one of America's foremost cybersecurity experts will share some practical tips for how you can keep yourself, your clients, and your family safe and secure online. You will learn how to keep kids safe on social media, how to avoid having to remember hundreds of online passwords (and how to avoid having them hacked), and how to protect your privacy while surfing the Internet.

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12:05-1:10pm EST

CEU: 1 hour Standards of Practice

Breakout Session 1: Embracing AI Technology - Speaker Mike Moran

AI in Business: The Ugly, The Bad, The Good explores the complex landscape of artificial intelligence adoption in the corporate world. Highlights the concerning vulnerabilities and security risks associated with AI implementation, while also highlighting its transformative potential. It touches on some of the relevant hardware and software tools that might be useful to the AADMM audience.

12:05-1:10pm EST

CEU: 1 Hour, Standards of Practice and Types of Expense

Breakout Session 2: Navigating 2025 Medicare Changes - Speaker Dan Mangus

Medicare continues to change and adapt to the economic and healthcare environment. 2025 will bring mutiple changes due to many factors including the Inflation Reduction Act, Medicare Final Rule changes and implementing the nondiscrimination requirements associated with the Affordable Care Act. Medicare beneficiaries face many decisions from ways to access care, choosing appropriate healthcare plans to help pay for care, and getting all of the benefits from Medicare, other government programs, and their healthcare plan that they deserve. There are questions that they need to be asking and essential facts they need to know to make those critical decisions. This webinar will give current tools and tips to navigate the Medicare landscape.

1:10pm-1:40pm EST **Break**

1:40pm-2:45pm EST

CEU: None

General Session: Ready to Grow? Learn from the Growth Journey of Everyday Money Management - Speakers Leah Nichaman & Shira Nichaman

Ready to Grow? Learn from the Growth Journey of Everyday Money Management

Everyday Money Management is one of the largest DMM firms in the United States. Hear from its founder and Director of Operations about how they built it and learn important things to consider on your own growth journey. This session will cover hiring, building your infrastructure, developing and documenting processes, and training new staff.

AGENDA

FRIDAY, NOVEMBER 8, 2024

2:45pm-3:45pm EST

CEU: 0.5 Hour, Standards of Practice and Types of Expenses and 0.5 Hour, Ethics

Breakout Session 3: Aging Life - Speakers Jeffrey Wildstein & Kate Granigan

Presenters will discuss when to refer and defer to a care manager or other similar professional. Also liability and other issues to consider when a DMM's skill and expertise ends. Presenters will discuss confidentiality concerns, and when reporting care issues is the best practice. The presentation will include scenarios and challenges DMMs and care managers face when working together.

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2:45pm-3:45pm EST

CEU: 1 hour, Standards of Practice

Breakout Session 4: Technologies, Tools & Strategies - Speaker Shannon Tefft-Janes

This session will provide attendees with a blueprint and action plan to help streamline operations while balancing client independence and autonomy.The presenter explains the Financial Fortress methodology which incorporate various disciplines and schools of thought from personal finance and security. By Streamlining accounts, assigning roles, and purposeful management of communications, attendees will learn how to more easily monitor accounts and reduce fraud while preserving client agency.

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3:45pm-4:05pm EST

Break

4:05-5:05pm EST

CEU: None

Panel Discussion: Communities of Practice - Speakers Caitlin Hall, Robert Mayetta, Barb Lyon, Stacy Jo Thorne

You asked and we heard you! DMMs are looking for community. You want to be able to connect with other DMMs who are working in similar practice areas, regardless of location. Come and hear how experienced DMMs are practicing in your specialty or a specialty you're interested in tapping into.

5:05pm-6:05pm EST

CEU: None

Networking/Day 1 Wrap Up/Communities of Practice - Speakers Caitlin Hall, Robert Mayetta, Barb Lyon, Stacy Jo Thorne

Meet the Panelists in breakout rooms to continue the conversation.

AGENDA

SATURDAY, NOVEMBER 9, 2024

10:00am-11:00am EST **First Timers and New Members at the Conference Meet and Greet**

Hosted by the AADMM Membership Committee, if you are new to AADMM (having joined AADMM in the last two years) or are a First Time AADMM Conference Attendee, you are welcome to join us in this breakout session for a special Meet & Greet and open Q&A session to help navigate how to get the most out of your membership with AADMM and the world of being a DMM.

11:00am-11:05am EST **Welcome & Overview**

11:10am-12:10am EST **Panel Discussion on Ethics: Ethics 2024 - Case Studies on Cultural Differences, Aging, and Mental Capacity - Speakers Natasha Faria Smith, Jennifer Pilz**

CEU: 1 Hour, Ethics

This presentation aims to bridge the gap between aging life care and financial management through a series of enlightening case studies. These real-life scenarios including individuals with varying cultural backgrounds, ages, and diminished capacity will demonstrate the intricate relationship between managing the care needs of seniors and their financial planning. By showcasing these case studies, the session will provide daily money managers with practical insights and strategies to better serve their clients.

12:15-1:15pm EST **Annual Meeting**

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1:20-2:00pm EST **AADMM Board Forum**

2:00pm-2:20pm EST **Break**

2:20pm-3:20pm EST **Breakout Session 5: Dealing with a Client's Incapacity, When to Call a Fiduciary - Speaker Darby Jones**

CEU: 0.5 Hour Standards of Practice, 0.5 Hours Ethics

In this session, Darby Jones will discuss the challenges, liabilities, and best practices when faced with a client showing signs of cognitive decline. She will provide important tips to utilize during a client's onboarding process; when it may be necessary to bring in and elder law or estate planning attorney (and what the difference is between them); what is "incapacity" really?; what is fiduciary duty; suggestions for protecting yourself from liability; understanding the estate documents that may be in place; and how to safely provide services if incapacity exists.

2:20pm-3:20pm EST **Breakout Session 6: Estates - How DMMs Can Help Advisors and Clients Meet Their Goals - Speaker Amy Egtvet**

CEU: 1 Hour, Standards of Practice and Types of Expenses

Amy Egtvet of WE Trust Company will detail the helpful role DMMs can play in their clients lives before or after a death occurs. What can you organize so family or advisors can assist in the event of a passing? What questions should you ask your clients about their estate plan, account titling and other assets they value to ensure the plan works the way they intend? What should you do and not do immediately after a client passes away? What is a probate and who is in charge? How do trusts fit into estate planning? Learn ways to help your clients prepare for the inevitable and ensure that their wishes are carried out by those left behind.

AGENDA

SATURDAY, NOVEMBER 9, 2024

3:25pm-4:25pm EST

CEU: None

General Session: The Power of Purpose - Speaker Dale Wilsher

What is your purpose? Is it your job ? The people that you love or lead? Your goals? Actually, it's none of those things. Your purpose is not WHAT you do, or WHO you serve, or WHERE you are going. Your purpose is WHY you exist and the difference you are here to make. In this inspiring message, Dale shows you how to find your purpose and realize your greatest potential in both your personal and professional life. Through an understanding of your signature strengths, core values, mission and vision, you will begin to see what you are here to do and rise up with courage to be all that you were meant to be.

4:25pm-4:30pm EST

Day 2 Wrap Up/Thank You/Announce location of 2025 conference

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