

# BEST FINANCIAL & LEGAL PRACTICES FOR CAREGIVERS TO PROTECT THEIR LOVED ONES

## MODERATOR

**Denise Lettau JD, DMSM LLC**

## SPEAKERS



### **Deborah Golden**

**Adult Protective Services Investigator  
Department of Children and Families**

Deborah Golden has been working for the State of Florida for just over 27 years. She began at the Department of Health and then transitioned to Adult Protective Services in 2006. As an investigator, she has investigated over 3,500 cases of abuse, neglect, exploitation, and self-neglect of vulnerable adults. In 2014, she became a regional trainer and then in 2020 the regional program supervisor. She has a degree in both social work and criminal justice from Florida Atlantic University.



### **Lisa Trueba Roberts**

**Chief Attorney Advisor, Miami Regional Office  
U.S. Securities and Exchange Commission**

Lisa Trueba Roberts is the Chief Attorney Advisor to the Regional Director of the Miami Regional Office of the SEC. Lisa has been an attorney with the SEC for over 30 years. Among other things, she supervises the Investor Assistance Specialists and conducts financial literacy outreach on behalf of the agency to promote the Commission's mission to protect investors. She conducts outreach throughout the Miami Regional Office's jurisdiction, which includes Florida, Mississippi, Louisiana, Puerto Rico, and the U.S Virgin Islands.

Lisa Roberts was an adjunct faculty member at the University of Florida Levin College of Law teaching a compressed Securities Law Enforcement course (2022 and 2023). She was previously an adjunct faculty member at Florida International College of Law also teaching a securities law enforcement course. Lisa Roberts is a Board Member of the Kozyak Minority Mentoring Foundation. The foundation works to promote diversity in the legal profession and finds mentors for minority law students at Florida law schools.

Lisa Roberts is a member of the Hispanic National Bar Association, the Cuban American Bar Association, and the South Florida Chapter of the Federal Bar Association. Lisa Roberts also serves on the Eleventh Judicial Circuit Grievance Committee of the Florida Bar.

Lisa Roberts is a graduate of the University of Miami School of Law. She received her bachelor's degree in business (cum laude) from the University of Florida.



**Stephanie L. Schneider**  
Board Certified Elder Law Attorney  
Law Office of Stephanie L. Schneider, P.A.

Stephanie Schneider is Board Certified in Elder Law by The Florida Bar and the National Academy of Elder Law Attorneys. She is also accredited by the Veteran's Administration to provide guidance to veterans and their spouses. She is a Past Chair of The Florida Bar's Elder Law Section. Stephanie takes pride in educating consumers and helping them navigate aging challenges so they can make informed legal decisions. Stephanie has a broad elder law practice and serves peoples of all ages, at all stages of life including all ethnicities and religions. Her elder law practice includes: special needs planning, government benefits, estate planning, probate, trust administration, guardianship and guardian advocacy for people with developmental disabilities. She is an ally in the LGBTQ community.

## **CAREGIVER SUPPORT PANEL**

### **MODERATOR**

**Caryn Blair, MSN, APRN, PMHNP-BC**  
**Caring for the Caregivers**

### **SPEAKERS**



**Dr. Lessep Duncan**  
Human Services Supervisor  
Broward County Elderly & Veterans Services

Dr. Lessep Duncan has worked in the field of Social Services and Social/Youth work with various populations since 1987. Dr. Duncan is the Human Services Supervisor of the Alzheimer's Disease Initiative Program for Broward County Elderly and Veterans Services. In this role he is responsible for providing Case Management, Respite Care, and also oversees the Consumer Directed Care program which provides a monthly stipend to clients requiring in-home assistance. Additionally, he facilitates several Caregiver Support Groups for Broward County residents.

Dr. Duncan has a PhD in Social Work from Barry University. For his Ph.D. dissertation he focused on the experience of caregivers of family members with ADRD in the Black community. Acknowledging the higher rate of Alzheimer's in the Black community his dissertation included cultural factors and reasons behind assuming the difficult and stressful role of caregiving.



## **Heidi Friedman, ESQ.**

**Florida Board Certified Elder Law Attorney  
General Counsel to Veterans Home Care, LLC**

Heidi Friedman is an attorney and the owner of Friedman Elder Law. The firm specializes in helping seniors qualify for government benefits to assist with paying for the overwhelming cost of long-term care, whether they live at home, in an assisted living facility or a skilled nursing home. Heidi also serves as general counsel to Veterans Home Care, a St. Louis company dedicated to providing home health care services to veterans and their surviving spouses paid through VA Aid and Attendance benefits.

As a VA accredited attorney, Heidi has devoted her career to supporting seniors, veterans, and their families. Her expertise in Elder Law and VA regulations has empowered seniors and veterans to access essential benefits and resources. She simplifies complex legal processes ensuring seniors, veterans and their families navigate their journey smoothly.

Heidi is a native Floridian, and a proud graduate of Nova Southeastern Law School and the University of Florida.



## **Adriana Gonzalez**

**Medicaid Benefits Counselor/MedWaiver Supervisor  
Area Agency on Aging of Broward County**

Adriana Gonzalez has been with the Area Agency on Aging of Broward County since 2007 in the role of Medicaid Benefits Counselor/Medwaiver Supervisor. In this role, Adriana is responsible for the coordination of activities to facilitate access and the eligibility determination for individuals seeking Medicaid Long Term Care services. Adriana Gonzalez is also responsible for training and public outreach and is the liaison between the Medicaid Benefits Counselor staff, the Department of Children and Families and the Cares Unit. She advocates for senior clientele by coordinating with Cares and DCF staff to resolve, in a timely manner, any eligibility issues that arise during the Medicaid Long Term Care process.

Adrianna has a Bachelor's Degree in Social Communication and a Specialist in Business Communications degree from the Universidad Externado de Colombia. She is also a Certified Information & Referral Specialist for Aging from the Alliance of Information & Referral Systems (AIRS).



## **Lisa Peters**

**SunServe - Director of Senior Services  
Noble A. McArtor Senior Day Care Center**

After spending 20 years working in Child Welfare in Broward County, Lisa Peters decided on a career change to work with seniors in our community. She spent over four years working in Palm Beach County where she oversaw the Medicaid Waiver, Community Care for the Elderly, Home Care for the Elderly and the Older Americans Act in home services programs. She was also responsible for three Dementia Specific Adult Day Care Centers and 8 Congregate Food Sites. She returned to Broward County where she was hired as the Director of Senior Services for SunServe, an LGBTQ Social Services agency located in Wilton Manors. In September 2016, she took over as the Director of the Noble A. McArtor Adult Day Care Center.



## **John Strader**

**Community Advocate/Caregiver  
Southeast Florida Chapter of the Alzheimer's Association**

John Strader is a long time resident of Hollywood and is a retired Florida licensed yacht broker with over 25 years of experience affiliated with HMY Yacht Sales, one of the world's largest yacht sales organizations. John retired in 2019 to care for his wife, Lisa, who is in the advanced stages of Alzheimer's disease.

In 2022, John began to volunteer with the local SE Florida chapter of the Alzheimer's Association and is currently a member of that chapter's Board of Directors. He is also a member of the Alzheimer's Impact Movement National Leadership Society, the political action arm of the Association. Through this Society, he spends time advocating with our local, state, and national government representatives on behalf of legislation and budgetary requests to fund Alzheimer's research, inform the general public, better educate the frontline medical community, and to help create and fund improved caregiver support programs.

John & Lisa have recently established a Legacy Fund to be administered by the Community Foundation of Broward to make sure that their support for the Alzheimer's Association, local dementia care support programs, and their other charitable interests are funded well into the future.



**Lisa Zucker**  
Owner and Licensed Therapist  
GriefTREE

Lisa Zucker is a practicing therapist and the owner of GriefTREE, a grief and trauma therapy practice offering therapy, resources, education, and events in South Florida. Lisa and her team of clinicians offer therapeutic services to people who have experienced losses of all kinds.

She has served on boards including the TAPS Advisory Council, Healthy Mothers Healthy Babies infant mortality review board, and the Area Agency on Aging and Aging & Disability Resource Center for Broward County.

Following the tragic events in 2019 at Marjory Stoneman Douglas High School in Parkland, Lisa was a founding member of Professionals United for Parkland where she served on the board, assisted with trainings, provided pro-bono services to families impacted by the shooting, and continues to serve in an advisory capacity. During this time, Lisa was trained in additional trauma interventions including EMDR. After unexpectedly losing her father in 2019 and her brother in 2021, Lisa expanded her therapy practice to reach more people who are grieving or had experienced trauma, knowing that this helped continue her family legacy of serving the community and caring for others. As a Qualified Supervisor and Certified Thanatologist, Lisa guides her team of clinicians in grief and trauma therapy as well as providing the community with debriefings following tragedies, educational opportunities, and events for griever, caregivers, and professionals wanting to learn more about grief and trauma.

## **KEYNOTE ADDRESS - DEPARTMENT OF ELDER AFFAIRS OVERVIEW**



**Michelle Branham**  
Secretary, Florida Department of Elder Affairs

Secretary Michelle Branham was appointed by Florida Governor Ron DeSantis to serve as the agency head for the Florida Department of Elder Affairs in December 2021. Under Secretary Branham's leadership, the Department serves Florida's nearly 6 million seniors over the age of 60, providing services and supporting initiatives through Florida's Aging Network to help seniors live well and age well in the state.

Secretary Branham brings more than 20 years of experience to her role — in public policy, public health, and public relations and more than a decade of senior executive experience in federal and state-level public policy initiatives including advanced healthcare and Florida senior initiatives.

Prior to her appointment, Secretary Branham was Vice President of Public Policy for the Alzheimer’s Association for nine years. She served as Chair for the State of Florida’s Alzheimer’s Disease Advisory Committee and was an Advisory Member for the State Plan on Aging Task Force. Additionally, she co-chaired the State Health Improvement Plan Alzheimer’s priority area and was appointed by Governor DeSantis to serve on his Safe and Limited Return Task Force during the public health emergency. Ms Branham holds a bachelor’s degree in Political Sciences from Stetson University and a master’s degree in Theological Studies from Emory University’s Candler School of Theology.



## **Cari Eyre**

**Statewide Dementia Director, Florida Department of Elder Affairs**

Cari Eyre is the Statewide Dementia Director for the Florida Department of Elder Affairs. Her role includes working with the Alzheimer’s Disease Advisory Committee, Florida’s 17 state-mandated Memory Disorder Clinics and Florida Brain Bank, the Alzheimer’s Disease Initiative, the 16 Dementia Care and Cure Initiatives around the state of Florida, and the Florida Alzheimer’s Centers of Excellence.

Cari has worked with individuals with dementia and family caregivers for nearly twenty years in direct care, health care systems, community health, and program development. She completed undergraduate work at California State Polytechnic University and earned a Master of Education in Advanced Teaching and Learning with a concentration in Public Health from the University of North Florida. Eyre later completed a post-Graduate professional certificate in Geriatric Care at the University of Florida. Cari has lived and worked in Northeast Florida since 2008.



# CHRONIC DISEASE MANAGEMENT - HOW TO IDENTIFY SIGNS AND SYMPTOMS IN YOUR LOVED ONE



## **Naushira Pandya, M.D., CMD, FACP**

**Chair, Geriatrics; Director, Geriatrics Education Center; Professor  
Nova Southeastern University**

Dr. Naushira Pandya is Professor and Chair of the Geriatrics Department at NSU, Kiran C. Patel College of Osteopathic Medicine, and the Project Director of the HRSA funded Geriatrics Workforce Enhancement Program. She is a certified medical director and a geriatrics fellowship program director with an active clinical practice in which she teaches health profession students, residents, and fellows.

Dr. Pandya is Past President of AMDA, the national Society for Post-Acute and Long-Term Care Medicine, and past chair of the interdisciplinary Clinical Practice Committee. She has participated in the development of multiple clinical guidelines and position statements, and is recognized for her work in the area of diabetes in the elderly. She is board-certified in Internal Medicine, Geriatrics and Endocrinology and Metabolism, and holds the distinction of being a Fulbright Senior Specialist Scholar.

# THE LATEST RESEARCH AND DRUGS AVAILABLE TO ALZHEIMER'S PATIENTS PRESENTATION



## **Shaye Moskowitz, M.D., Ph.D.**

**Neurosciences Medical Director  
Broward Health**

Shaye I. Moskowitz, M.D., Ph. D. has served as the Neurosciences Medical Director at Broward Health since February 21, 2022. Dr. Moskowitz specializes in Endovascular and General Neurosurgery. Prior to joining Broward Health, Dr. Moskowitz worked for the University of Colorado Health Memorial Hospital in Cerebrovascular and Neuroendovascular Surgery from 2016-2020 and before that for Marcus Neuroscience Institute at Boca Raton Regional Hospital as the Co-director of Stroke and Co-director of Neurosurgery from 2014-2016. Dr. Moskowitz received a Bachelor of Arts in Physics from Yeshiva University in New York, Doctor of Medicine from SUNY- Health Science Center at Brooklyn and Doctor of Philosophy from SUNY- Health Science Center at Brooklyn, Program in Neural and Behavioral Sciences.

Dr. Moskowitz has the following educational awards: SUNY graduate Student Travel Fellowship, American Heart Association Medical Student Research Fellowship, Lowen Award for excellence in physics, Dean's list at Yeshiva University. He clinically trained at the Cleveland Clinic in Ohio and was a Fellow in Endovascular Surgical Neuroradiology in the Department of Radiology, a Resident Physician in the Department of Neurosurgery, and an intern in the Department of Surgery.

## **THE CONTINUUM OF SERVICES AVAILABLE TO CAREGIVERS AND INDIVIDUALS WITH DEMENTIA AND ALZHEIMER'S**

### **MODERATOR**

**Tim Curtin, Memorial Healthcare System**

### **SPEAKERS**



**Antoinette Buckham Charles  
BSN, MHA, CNRN, LSSGB, CDP**

**Memory Disorder & Alzheimer's Center Coordinator  
Broward Health**

Antoinette Buckham is the coordinator of the Broward Health Memory Disorder & Alzheimer's Center located at Broward Health North. Antoinette has 24 years of nursing experience with eighteen of those years spent at Broward Health. While there, she has had the opportunity to gain experience in various departments throughout the system such as the Neuro Telemetry Unit, Neuro Stepdown Unit, Intensive Care Unit, Emergency Room, Transfer Center, and Global Operations at Broward Health International.

Upon graduating High school at age 16, she self-enrolled into the Kingston School of Nursing where her nursing journey began. For a few years, Antoinette worked as a Registered Nurse in Jamaica before migrating to the United States in 2003. With her passion for nursing unabated, she joined the Broward Health family in 2006 to continue in the profession that she loves.

Antoinette Buckham Charles holds a Bachelor of Science degree in Nursing and an Executive Master degree in Healthcare Administration from Florida Atlantic University. She is a Certified Neuroscience Registered Nurse by the American Association of Neuroscience Nurses, a certified Dementia Practitioner by the National Council of Certified Dementia Practitioners, and she is Lean Six Sigma Green Belt Certified. In 2023, she was honored with the Volunteer Recognition Award by Secretary Michelle Brenham from the Department of Elder Affairs. She also received the Outstanding Healthcare Practitioner Award from the Greater Fort Lauderdale Chamber of Commerce.





## **Kathrina Davenport**

**Social Services Director  
City of Miramar**

Katrina Davenport is the Social Services Director with the City of Miramar Social Services Department. In this role, she directs the development, administration, and supervision of the department to ensure the effective management of the City's social services programs.

As Director, she oversees the administration of four programs: Miramarvels Early Childhood Academy, Senior Services, Youth and Family Outreach and Adult Day Care. Davenport is the Project Director of the Southcentral/Southeast Focal Point (SCSEFP) which includes two senior centers and an adult day care center.

The SCSEFP serves the south central and southeast sectors of Broward County. Katrina has developed and prepared operating procedures, grant proposal applications and monitors the on-going activities associated with such grants. She maintains National Accreditations when awarded.

An advocate for our senior population, Kathrina Davenport supports programs and services that assist seniors with healthy aging and the ability to remain independent in their homes. She has more than 15 years of experience in counseling and social work. She holds a Master of Science degree in Mental Health Counseling from Nova Southeastern University and earned a Behavioral Health Certificate from Boston University, Center for Aging and Disability Education and Research.



## **Irma M. Diaz, MBA**

**Owner  
Homewatch CareGivers of Southwest Broward**

Irma Diaz is the proud owner of Homewatch CareGivers of Southwest Broward. A faith driven catholic woman, married for over 33 years and a proud mother of 3 she has been immersed in the world of home care, driven by a profound belief in the transformative power of compassionate and personalized support. She started this journey working in health and wellness over 18 years ago, with elder adults who needed that extra TLC.

At the heart of Homewatch CareGivers of Southwest Broward is a commitment to the core values "Integrity, Compassion, Accountability, Respect and Empathy". Irma believes that every individual, regardless of their circumstances, deserves service that is not only professional but compassionate. The core values are the guiding principles in shaping the ethos of the agency.

Irma is passionate about a client-centered approach, understanding that each person she serves is unique, with his or her own life story, preferences, and needs. As an advocate for quality care, she actively engages with industry initiatives and regulatory developments.

Her favorite bible verse is: John 15:12 "To love each other as I have loved you".



## **Elizabeth L. Lombardo**

**Program Director**

**Area Agency on Aging of Broward County**

Elizabeth Lombardo has worked for the Area Agency on Aging of Broward County since 1998. She has twenty-four years of experience working with the elder provider network. As Program Director at the Area Agency on Aging of Broward County, she oversees staff whose primary role is conducting quality assurance monitoring of providers. She uses that experience to look at ways we can expand and improve services to better serve elders and adults with disabilities who are on waiting lists for services.

Prior to joining the elder network, Elizabeth Lombardo worked in the Government and Institutional Inside Sales Division of Goldline Laboratories doing contracts and contract sales. A graduate of Florida Atlantic University, Elizabeth Lombardo earned her BA in Sociology.



## **Steve Strumpf**

**Executive Director**

**Royal Senior Care, Oakmonte Village**

Steven Strumpf is the Executive Director of Oakmonte Village of Davie, a 10-acre 220 licensed bed community. In this role, he is responsible for all sales, operations, and business development campus wide. Steve Strumpf's professional career includes hospitality and healthcare general management in all areas of independent, assisted, and memory care services. He is passionate about delivering world class hospitality and services for his residents, resident family members and team members through a servant leadership culture.

Steven graduated with a Bachelor of Arts in Business from Loras College in Dubuque IA. He is a Certified Dementia Practitioner (CDP) and is CORE Certified.