



CANADIAN CENTRE FOR ELDER LAW

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Inclusive Investing: Respecting the Rights of Vulnerable Investors through Supported Decision Making

Project Advisory Committee—Biographies

Jim Emmerton, PAC Chair

Senior Fellow, Canadian Centre for Elder Law

Jim Emmerton served as the executive director of the British Columbia Law Institute and the Canadian Centre for Elder Law from 2007 to 2015. He is a long-serving community director and a member of the Finance and Audit Committee of the Ombudsman for Banking Services and Investments (OBSI) board and currently Chair of the OBSI board. He has also served as a member of the National Seniors Council and as a member of OBSI's Consumer and Investor Advisory Council before joining the board.

Tim Ames

Executive Director, PLAN BC

As Executive Director Tim is responsible for the implementation of the collaborative strategic direction of both Plan Institute & PLAN, a role that he has held for five years. Tim has also served as a community connector for PLAN, sat on the board of Plan Institute and worked for three years as General Manager for Tyze—an online personal networking service and a certified B-Corp Social Enterprise developed by PLAN.

Tim also teaches Sustainable Innovation and is a Mentor in Residence at Simon Fraser University and the Venture Connection. Before working in the Not for Profit sector Tim was the Managing Director and Vice President of an International technology company and worked in Canada, the USA and Europe. Tim brings over 25 years of experience in business, sales, management, and personal development and is passionate about helping people and organizations create success and sustainability.

Lauren Bates

Lawyer

A lawyer by training, Lauren Bates has focused her skills on public policy and law reform, with a particular interest in human rights and equity issues. Early in her career, she worked in legal and business publishing, including as Managing Editor of CCH Canadian's Human Resources, Legal and Business Division. As a Senior Policy Analyst at the Ontario Human Rights Commission, she led projects on disability inclusion, transit accessibility, pregnancy and breastfeeding, family caregiving and mandatory retirement, among others. For this work, she received the Amethyst Award for public service.

Lauren joined the Law Commission of Ontario, Ontario's independent law reform agency, at its inception and played an important role in its development. As its Senior Lawyer, she led projects related to the law and aging, disability and the law, alternative financial services, legal capacity and guardianship, and improving the last stages of life. As Director of Policy at Wellesley Institute, she built capacity within the organization to use rights-based approaches to address equity issues related to aging, caregiving and access to health services, among others. She has lent her skills as a volunteer to many organizations, including the Ontario Caregiver Coalition, Elder Abuse Ontario, and the British Columbia Law Institute's project on Family Status.

Emily Clough

Lawyer, Clark Wilson LLP

BCLI/CCEL Board of Directors Member

Emily is a partner at Clark Wilson LLP. Emily has focused her legal career on all aspects of estates, trusts and incapacity matters. She advocates for clients in contested litigation matters. She assists clients in preparing estate, trust and incapacity planning documents. She works with clients regarding the administration of estates through probate. Emily is known to be a dedicated and passionate advocate, particularly regarding the complex issues that arise regarding mental capacity.

Kurt Goddard

*Director of Policy and Program Operations
Canadian Association for Community Living*

Kurt Goddard is the Director of Policy and Program Operations for the Canadian Association for Community Living (CACL). Before joining CACL, he worked in politics in various roles at the provincial and federal level, and most recently as a Senior Advisor and Executive Assistant to the Premier of New Brunswick.

Kurt holds graduate degrees in law and political science and recently completed a Juris Doctor at the University of New Brunswick. Before law school, Kurt worked for the New Brunswick Association for Community Living (NBACL) as their Manager of Family Support and served on a number of non-profit boards and committees. He resides in Fredericton, New Brunswick with his wife, Rebecca.

Ken Gracey

*Manager, Investor Education and Engagement
British Columbia Securities Commission*

Ken Gracey is the Manager, Investor Education and Engagement with the British Columbia Securities Commission (BCSC). Ken leads external communications outreach, program development, and digital initiatives that support the BCSC's investor education work. Ken is a member of the North American Securities Administrators Associations' Alerts and Advisories project group and the Canadian Securities Administrators' Investor Education Committee. Ken has worked at a public relations agency and as a journalist, writing for a variety of Vancouver-area community newspapers. He is a graduate of Simon Fraser University, and Langara College's Journalism program.

Mario Gregorio

Person living with dementia

Mario was diagnosed with vascular dementia almost ten years ago. He is very active in initiatives like the Dementia Friendly Community Action Plan and an advocate to create AWE: Awareness, Wiping out Stigma and Education. He is one of the eight members of the Advisory Board for Alzheimer Society selected

across Canada who helped create the Charter of Rights for People with Dementia.

Robert Lattanzio

Executive Director

ARCH Disability Law Centre

Roberto Lattanzio is the Executive Director of ARCH Disability Law Centre. He joined ARCH as an articling student in 2003 and was called to the Bar of Ontario in 2004. Robert received his LL.B and B.C.L. law degrees from McGill University in 2003 with distinction, and received his B.A. from Concordia University in 1999 with honours. He has acted as counsel in test case litigation at all levels of court, including the Supreme Court of Canada, and has made law reform submissions to various levels of government, committees, and administrative bodies. Robert has presented and written on many topics such as equality and human rights law, administrative law, education law, legislative reform, and social science evidence. Robert has a long-standing interest in disability issues and had extensive work experience with disability communities prior to attending law school.

Alison Leaney

Provincial Coordinator, Vulnerable Adults Community Response

Public Guardian and Trustee of British Columbia

Alison Leaney is a Registered Social Worker and the Provincial Coordinator, Vulnerable Adults Community Response in Services to Adults at the Public Guardian and Trustee of BC where she has spent 22 years in implementation of BC's adult guardianship legislation.

Alison chairs the BC Association of Social Workers Seniors Community of Practice. She is a former chair of the Canadian Network for the Prevention of Elder Abuse and former Executive Director of the BC Association of Community Response Networks. Her practice as a front line social worker has been in the medical, corrections, domestic violence, hospice, bereavement support and pastoral care fields. She has worked locally, provincially and nationally. Most recently she was a part time contractor hired to coordinate the Sunshine Coast Seniors Planning Table.

Alison was recently awarded the Queens Diamond Jubilee Medal for her work to create a coordinated response to adult abuse and neglect in BC and Canada and was a finalist for the Premier's Legacy Award for the same work in 2010. Alison has also recently been appointed to the National Seniors Council.

Barbara Lindsay

*Director, Advocacy & Education; Marketing & Communications
Alzheimer Society of BC*

Committed to ensuring that the voices of people affected by dementia are heard, Barbara Lindsay has been with the Alzheimer Society of B.C. since 1997 and is the Director of Advocacy & Education as well as Marketing & Communications. Barbara is responsible for a diverse portfolio which includes planning, implementing evaluating public policy, liaising with government agencies and increasing public engagement. A lawyer whose passion is for people rather than paperwork, Barbara also assists the Society in its work supporting people affected by the disease with advocacy and legal planning, as well as acting as the Society's privacy officer.

Marian Passmore

Legal, Regulatory and Policy Advisor

Marian is a lawyer who has been actively involved in securities regulatory policy developments on behalf of retail investors and financial consumers, including the vulnerable. Previously Director of Policy & COO at The Canadian Foundation for the Advancement of Investor Rights ("FAIR Canada"), Marian provided the retail investor perspective in such areas as the client-registrant relationship, proposed financial planning reforms, improving the detection, prevention and response to senior financial abuse and investment fraud, reforms to investor recovery and dispute resolution, and regulatory structures and frameworks.

Marian is the co-researcher and co-author with Laura Tamblyn-Watts of the 2017 joint *Report on Vulnerable Investors: Elder Abuse, Financial Exploitation, Due Influence and Diminished Mental Capacity* and a co-founder of Canada's first Investor Protection Clinic at Osgoode Hall Law School.

Karla Verschoor

Executive Director

Inclusion BC

Karla Verschoor has been with Inclusion BC since 2006, when she joined the organization as a volunteer coordinator. Over the years, Karla has worked in various leadership roles as an advocate, strategic planner and now as Executive Director. Karla has a Bachelor of Arts degree from the University of Alberta where she studied Political Science and Government and a Certificate in Dialogue and Civic Engagement from Simon Fraser University. Karla lives in Vancouver with her husband and daughter. When she's not working Karla enjoys volunteering at her daughter's school and with her local neighbourhood house.

Eleanor Wong

Community Investment Portfolio Manager

Community Business & Investment Department

Vancity

Eleanor began her career 20 years ago in financial services and very quickly obtained her Certified Financial Planning designation. After a few years in wealth management training and development, Eleanor moved into the Financial Literacy Program Manager role where she expanded an award-winning financial literacy program nationally and trained over 100 staff to deliver sessions in the community.

As a community economic builder, financial professional and collaborator, Eleanor's skills range from advising, training, coaching and strategy which serves well in her current work to connect with the community to identify needs and find solutions. Internally at Vancity, Eleanor works with cross-functional teams to convene, educate and build capacity to increase understanding of community impact.