

## Panel Member Biographies for Panel # 1 – Sounding the Alarm



**Robert R. Weathers** is a Supervisory Economist within the Office of the Chief Actuary at the Social Security Administration. He is responsible for the production of economic and revenue projections used to estimate the financial status of Social Security programs. His past research has focused on the design and evaluation of random assignment demonstration projects, including work on the Accelerated Benefits Demonstration, the Benefit Offset Pilot Demonstration, and the Benefit Offset National Demonstration. He co-edited a book on disability statistics, and he has published journal articles and policy briefs that describe the effects of disability policy on the employment and program participation of individuals with a disability. He has a Ph.D. degree in Economics from Syracuse University.



**Dr. Duke Han** is a Diplomate of the American Board of Professional Psychology in clinical neuropsychology, Director of Neuropsychology in the Department of Family Medicine, and an Associate Professor of Family Medicine, Neurology, Psychology, and Gerontology at the University of Southern California Keck School of Medicine. He received his Bachelor of Science degree in psychology with a specialization in neuroscience from Duke University, and his doctorate in clinical psychology from the University of Massachusetts Boston. Dr. Han was trained in clinical neuropsychology and experimental neuroimaging methods through programs of Harvard Medical School's Brigham and Women's Hospital. He continued his clinical neuropsychology and neuroimaging activities during his internship and postdoctoral fellowship at UCSD and the San Diego VA Healthcare System. Dr. Han is interested in the study of factors that impact cognition and financial decision making in aging. He also has special interests in using novel neuroimaging and statistical approaches to better understand these factors. Dr. Han maintains an active research collaboration with the Rush Alzheimer's Disease Center of Rush University Medical Center in Chicago, where he was most recently a tenured faculty member. He is the recipient of the Paul B. Beeson NIH K23 Career Development Award in aging research (2012-2017), which is supported by the National Institute on Aging, the American Federation of Aging Research (AFAR), and the John A. Hartford Foundation. Dr. Han is actively involved in peer-review of research grants for the National Institute on Aging (NIA) and manuscripts for over 30 scientific journals. He is on the editorial board for the *Journal of Alzheimer's Disease* and *Archives of Clinical*

*Neuropsychology*, and is the only board-certified clinical neuropsychologist on the Global Council for Brain Health, an independent science collaborative convened by the AARP and AgeUK. Dr. Han is a member of the oral examiner cadre for the ABPP clinical neuropsychology board certification process, and currently holds leadership or mentorship roles in the International Neuropsychological Society (INS), the National Academy of Neuropsychology (NAN), the American Academy of Clinical Neuropsychology (AACN), and the Society of Clinical Neuropsychology (Division 40) of the American Psychological Association.

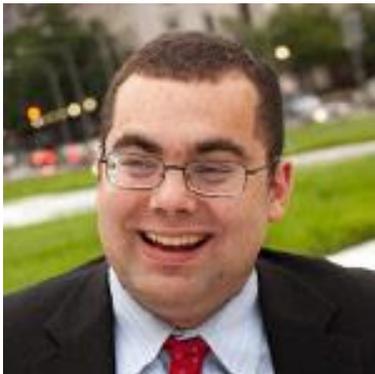
## Panel Member Biographies for Panel # 2 – Identifying Who Needs a Representative Payee

**Geoffrey T. Sanzenbacher, PhD** is a research economist at the Center for Retirement Research at Boston College. He conducts research on mortality, job mobility, the representative payee program, and the pension coverage gap with an interest in how these issues relate to low income workers. Recently, he has worked with states such as Oregon, Connecticut, and Illinois, that are considering expanding coverage in retirement savings plans to more private sector workers. Before joining the Center, he earned a doctorate in economics from Boston College in the fields of labor economics, applied econometrics, and applied microeconomics. He worked for several years after finishing his PhD as an economic consultant at Analysis Group in Boston. He currently teaches Intermediate Microeconomics, Econometrics, and the Economics of Inequality at Boston College.



**Paul S. Appelbaum, M.D.** is the Elizabeth K. Dollard Professor of Psychiatry, Medicine, and Law, and Director, Division of Law, Ethics, and Psychiatry, Department of Psychiatry, College of Physicians and Surgeons, Columbia University. He chaired the Committee to Evaluate the Social Security Administration’s Capability Determination Process for Adult Beneficiaries for the Institute of Medicine. Dr. Appelbaum directs Columbia’s Center for Research on Ethical, Legal, and Social Implications of Psychiatric, Neurologic, and Behavioral Genetics. The author of many articles and books on law and ethics in clinical practice and research, Dr.

Appelbaum is a Past President of the American Psychiatric Association and the American Academy of Psychiatry and the Law, and now chairs the APA’s DSM Steering Committee and the Standing Committee on Ethics of the World Psychiatric Association. He has been elected to the National Academy of Medicine. Dr. Appelbaum is a graduate of Columbia College, received his M.D. from Harvard Medical School, and completed his psychiatry residency at the Massachusetts Mental Health Center/Harvard Medical School.



**Ari Ne’eman** currently serves as Chief Executive Officer of MySupport.com, an online platform designed to empower seniors and people with disabilities to self-direct their own services, and as a policy consultant to the American Civil Liberties Union and other disability and civil rights groups. Mr. Ne’eman was the co-founder of the Autistic Self Advocacy Network and served as its President from 2006 to 2016. In 2009, President Obama nominated Mr. Ne’eman to the National Council on Disability, a federal agency charged with advising Congress and the President

on disability policy issues. He was confirmed by the Senate in July 2010 and served until 2015, during which time he chaired the Council's Committee on Entitlements Policy. From 2010 to 2012, he served as a public member to the Interagency Autism Coordinating Committee, a Federal advisory committee that coordinates all efforts within the Department of Health and Human Services concerning autism. Mr. Ne'eman also served as an adviser to the DSM-5 Neurodevelopmental Disorders Workgroup convened by the American Psychiatric Association. He previously served as a member of the National Quality Forum's Workgroup on Measuring Home and Community Based Services Quality and the Department of Labor's Advisory Committee on Increasing Competitive Integrated Employment of People with Disabilities. He is also a board member of the American Association of People with Disabilities, the Autistic Self Advocacy Network and the World Institute on Disability.

## Panel Member Biographies for Panel # 3 – Perspectives from the Front Lines



**Ed Doonan** is the Chairman of the Board of National Association of Organizational Representative Payees. He also serves as Government Affairs Liaison with Benefits Management Corporation/Living in Familiar Environments, a community based representative payee headquartered in Sacramento CA. He is a retired Captain serving over 34 years in the Sacramento county Sheriff's Department. He has investigated the trauma inflicted on disabled people who are victimized, particularly with financial abuse. He has also witnessed the tremendous rise in the homeless population. Often, these individuals' disabilities also include their inability to manage their finances.



**Susanne Horn, MSW** is the Representative Payee Program Manager at Bread for the City, a private nonprofit in Washington, DC, that provides vulnerable residents of Washington, DC with comprehensive services, including food, clothing, medical care, and legal and social services, in an atmosphere of dignity and respect. Ms. Horn joined the Social Services program at Bread for the City in 2001 as a Case Manager and became the Representative Payee Program Manager at the inception of the agency's contract with the District's Department of Behavioral Health in 2002. Under this contract the RPP provides organizational payee services to over 800 individuals by collaborating with members of each consumer's mental health treatment team at provider agencies around the city. Ms. Horn received her MSW from The Catholic University of America.



**Lawrence L. Sharp, III** serves as the CEO and Founder of SMILE and Using Money Wisely, a nonprofit, tax-exempt, community-based organization created in 1998, with the purpose to innovatively bridge the gap between the home, school, community, and church. Facilitating economic development, community revitalization, and deliver financial literacy services.

Mr. Sharp created SMILE Payee Services (SMILE) in 2008, successfully providing Representative Payee, Money Management, and Bill Payment Services for people receiving Social Security or other government benefits, work wages, or may have need for an Alternative Payee. We currently serve over 1,200 SSA beneficiaries in Ohio, Maryland, and the District of Columbia.

Mr. Sharp has over 35 years of experience providing staff training, development, and supervision. Mr. Sharp is often found working alongside his staff on the front lines serving the most vulnerable of our society. He enjoys creating community-based Peer Mentors to assist with building strategic partnerships and alliances to facilitate change at the community level. Realizing that when you emotionally engage people to work collectively at the community level, poverty can be alleviated; the environment can be protected; health can be improved; and people can be educated.

Mr. Sharp brings strategic focus and mature business judgment gained from nearly four decades of diverse CEO experience, integrated with a variety of technology, and marketing relationships to support business development or capital challenges. Mr. Sharp champions using economic development to drive and support community revitalization.

## Panel Member Biographies for Panel # 4 – Monitoring Representative Payee Performance



**Eric Ice** is the Director for the Office Representative Payee and Due Process Policy in the Office of Income Security Programs (OISP) at the Social Security Administration (SSA). After working as a political consultant, Mr. Ice entered federal service as a Presidential Management Fellow (PMF) where he completed assignments at the U.S. Department of Labor – Office of Budget and the U.S. House of Representatives – Committee on the Budget.

Mr. Ice joined SSA in 2000 where he completed assignments in labor relations and served as a SSI claims representative in the Gladstone, MO field office. In 2001, Mr. Ice joined OISP and has advanced through various positions in a wide-array of program policy areas. Mr. Ice’s program experience includes SSI, enumeration, representative payee, and due process policy. Mr. Ice has also completed an assignment as a Senior Advisor, in the Office of Public Service, and Operations Support (OPSOS).

Mr. Ice holds a Bachelor of Arts degree in Political Science from Drury University and a Master of Public Administration (MPA) from Missouri State University.

**Cate Boyko** is the manager of the Minnesota Judicial Branch statewide Conservator Account Auditing Program. Ms. Boyko was the project manager for the award winning MYMNConservator (MMC). MMC is an online application used by Minnesota conservators to electronically file inventories and annual accounts with Minnesota courts. Ms. Boyko has extensive experience with program administration, project management, auditing supervision, and white collar crime investigation.

Prior to her position with the Minnesota Judicial Branch, Ms. Boyko was a Supervisor in Individual Income Tax Auditing with the Minnesota Department of Revenue. Ms. Boyko’s experience preceding auditing was in white collar crime investigation with the Criminal Division of Minnesota Revenue. Before joining the tax department Cate was a police officer and investigator with the Royal Canadian Mounted Police. She has a Master of Public Administration degree.

**Curt Decker** has been affiliated with the National Disability Rights Network (NDRN) since its inception in 1982. As Executive Director of the nation’s largest non-governmental enforcer of

disability rights, Mr. Decker oversees all activities related to training and technical assistance, membership services, and legislative advocacy.

Before founding NDRN with other Protection and Advocacy (P&A) Directors, Mr. Decker served as Director of the Maryland P&A, the Maryland Disability Law Center (MDLC). Mr. Decker also served as Director of the H.E.L.P. Resource Project for Abused and Neglected Children for four years, and was a VISTA worker prior to working as a senior attorney for Baltimore Legal Aid Bureau for five years.

Mr. Decker is the immediate past chair of the Consortium for Citizens with Disabilities (CCD), a coalition of over 100 national disability groups, and serves on the boards of Friends of Research and Opera Vivente. In his career, Mr. Decker also served as a legislative consultant for numerous groups, including the American Association on Mental Retardation, the National Public Law Training Center, and the Maryland Academy of Physician's Assistants. He is a graduate of Hamilton College and Cornell Law School.



**James J. Klein** is the Director of the San Francisco Audit Division for the Social Security Administration's (SSA), Office of the Inspector General (OIG). In this capacity, Mr. Klein oversees nation-wide performance and financial audits of SSA programs. He also directs regional audits in Alaska, Arizona, California, Hawaii, Idaho, Nevada, Oregon and Washington. Mr. Klein began his Federal career with SSA's Office of Operations in 1982. In 1989, he joined the Department of Health and Human Services' OIG as a program analyst, focusing on audits of SSA's programs and operations. When SSA became an independent agency in 1995, Mr. Klein joined its OIG as an auditor. Prior to holding his current position, Jim was an Audit Manager in OIG's, General Management Audit Division in Baltimore, Maryland. During his career, Mr. Klein has received numerous individual and team awards for meritorious service, including the Council of the Inspectors General on Integrity and Efficiency Alexander Hamilton Award, Glenn/Roth Award for Exemplary Service and Audit Awards for Excellence. Mr. Klein is also a recipient of several Inspector General Awards and two Commissioner's Citations--the Agency's highest award. Mr. Klein received a Bachelor's degree from the University of Delaware and he is a Certified Public Accountant.

## Panel Member Biographies for Panel # 5 – The Way Forward



**Sally Balch Hurme, J.D.**, has led the national conversation on many of the legal issues of concern to older persons and their families. Whether the issue is how to make decisions for others, plan for what comes next, or avoid fraud, she's been in the forefront. She focused her legal career on explaining the law so everyone can understand it.

For the past two decades, Ms. Hurme's volunteer commitment has focused on the rights of adults with diminished capacity and the reform of guardianship policy and procedures. She has served multiple terms on the boards of the National Guardianship Association and the Center for Guardianship Certification, where she has been instrumental in developing standards for guardians and criteria to improve professional competency. She's been an adviser to the Uniform Law Commission in drafting the Uniform Guardianship Jurisdiction Act and revising the Uniform Guardianship Act. As chair of the National Guardianship Network, a collaboration of 11 national organizations working to improve guardianship, she led the planning for the 2014 World Congress on Adult Guardianship. As a member of U.S. State Department delegation, she participated in the drafting of the Hague International Convention on the Protection of Incapacitated Adults. In 2008, she was honored by the National College of Probate Judges with the William Treat Award for excellence in probate law.

During her almost 25 years with AARP, she advocated on a wide range of issues including consumer fraud, financial exploitation, elder abuse, surrogate decision making, advance care planning, predatory mortgage lending, health care fraud, and financial security. Ms. Hurme taught elder law as an adjunct professor in elder law at the George Washington University Law School for eight years, honing her ability to explain the law.

Ms. Hurme is a long-term member of the National Academy of Elder Law Attorneys, the American Bar Association, and the Virginia and District of Columbia bars. She was a member of the Discipline and Ethics Commission of the Certified Financial Planners Board of Standards, deciding disciplinary actions against Certified Financial Planners. She is also vice-chair of the board of governors of the Stuart Hall School in Staunton, Virginia. Rounding out her volunteer activities, she has recently become a Certified Health Minister.

Ms. Hurme is the author of the award winning ABA/AARP Checklist series: *Get the Most Out of Retirement*, *Checklist for My Family*, *Checklist for Family Caregivers*, and *Checklist for Family*

*Survivors*, and managed the 2016 updating of NGA's *The Fundamentals of Guardianship*. Hurme is quoted frequently in national media, including the *Wall Street Journal*, *USA Today*, *New York Times*, *Money*, *Kiplinger's Retirement Report*, CNN.com, NPR, and Fox Business News. She is in demand as a speaker, having given more than 100 presentations on elder law topics in at least 40 states. She has lectured on elder abuse and guardianship in Australia, Czech Republic, Germany, Great Britain, Italy, Japan, Moldova, the Netherlands, and Spain. She received her B.A. from Newcomb College of Tulane University, New Orleans, Louisiana, and received her J.D. cum laude from the Washington College of Law, American University, Washington, D.C. Now retired from AARP, she lives in Bridgewater, VA.



**Matthew Lee Wiener** is the Vice Chairman and Executive Director of the Administrative Conference of the United States. Before affiliating with the Conference, he was general counsel to U.S. Senator Arlen Specter, counsel to the U.S. House of the Representatives Committee on the Judiciary, a partner at Dechert LLP, and special counsel to Cuneo Gilbert & LaDuca.

Mr. Wiener is an elected member of the American Law Institute and a fellow of the American Bar Foundation. Among his outside activities, he co-chairs the Adjudication Committee of the American Bar Association Section of Administrative Law and Regulatory Practice, and previously served on the Steering Committee of the D.C. Bar's Administrative Law and Agency Practice Section. He has taught courses on congressional powers and the judiciary, statutory interpretation, and remedies as a lecturer at the University of Pennsylvania Law School, George Mason University School of Law, and Rutgers University Law School. He holds a J.D. from Stanford Law School, where he was articles editor of the *Stanford Law Review*, and an A.B. from William and Mary.



**Nyree Ryder Tee** is an Assistant Director in GAO's Education, Workforce and Income Security team. She is primarily responsible for planning and executing reviews of federal disability programs. Since joining GAO in 2002, she has led evaluations related to retirement security, education, and disability programs. Ms. Ryder Tee has worked on reviews examining the potential for physician-assisted fraud in SSA's disability programs, SSA's management of the Representative Payee Program, and oversight of VA's Fiduciary Program, among other topics. She also facilitates diversity and inclusion, leadership, and audit-related training courses in GAO. Ms. Ryder Tee has a master's degree in public policy from the Rockefeller

College of Public Affairs & Policy, University at Albany (State University of New York), as well as a bachelor's degree in political science and English from the University at Albany.



**Gale Stallworth Stone** currently serves as the Acting Inspector General for the Social Security Administration (SSA). Under her direction, the SSA Office of the Inspector General (OIG) inspires public confidence in the integrity and security of SSA's programs by conducting independent and objective audits, evaluations, and investigations. Mrs. Stone has served in this role since May 29, 2016.

Mrs. Stone was appointed to the position of Deputy Inspector General on February 24, 2013. In this capacity, she provided leadership and guidance in the planning, policy and program development and management of the OIG.

Mrs. Stone has been a part of the Social Security Administration's OIG since its inception in March 1995. She previously held various positions at the U.S. Department of Health and Human Services (HHS) OIG. Since 1995, Mrs. Stone has held a number of leadership positions within the SSA OIG. Most recently, she served as the Deputy Assistant Inspector General for Audit, with primary responsibility for financial and information technology audits. She is also currently serving on the Information Security and Privacy Advisory Board, which advises the National Institute of Standards and Technology.

Mrs. Stone began her Federal career as a cooperative education student in the Birmingham, Alabama office of the HHS OIG. Over the years, Mrs. Stone has received numerous awards, including a 1996 Hammer Award, a 2002 Inspector General Award, and recognition from the former President's Council on Integrity and Efficiency including a 2004 Glenn Roth Award, a 2006 Award for Excellence, a 2007 Barry Snyder PCIE/ECIE Joint Award, and a 2015 Presidential Rank Award.

Mrs. Stone is a cum laude graduate of Huntingdon College in Montgomery, Alabama. She also holds a Master of Science Degree in Information Systems from The Johns Hopkins University, and she is a Certified Public Accountant.