Wednesday • April 11 • 2007
8:30 a.m. - 3:00 p.m.
Cone Ballrooms
Elliott University Center • UNCG

Sponsors
Passman Family Holdings, LLC
Steven D. Bell & Company
The UNCG Gerontology Program
The Bryan School of Business and Economics at UNCG
The Graduate School at UNCG
WellSpring Retirement Community

Exhibitors
AARP North Carolina
Abbotswood Independent & Assisted Living
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Senior Care Concepts
Senior Resources of Guilford
Therapeutic Alternatives
Triad Retirement Living Association
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The Boomer Project
The UNCG Speech & Hearing Center & Clinic
UNC Institute on Aging
WellSpring Retirement Community
There are a million reasons to plan for your future. You only need one.
8:30 a.m. Registration packet pick-up and visit with Exhibitors.
9:00 a.m. Welcome!

- Janice I. Wassel, Ph.D., RFG, Director of The UNCG Gerontology Program and Co-Director of the MS in Gerontology – MBA Dual Degree Program, UNCG
- James C. Petersen, Ph.D., Dean of the Graduate School, UNCG
- Donald McCrickard, Ph.D., Associate Dean of The Bryan School of Business and Economics, UNCG

Introductions – *Boomers, Businesses, and Residential Choices*
- Neal E. Cutler, Summit Chair and Associate Director of The UNCG Gerontology Program

Keynote Speaker — Housing and the Aging Bubble: Value, Value, Value
- Lois A. Vitt, MBA, Ph.D., Director, Institute for Socio-Financial Studies, Editor-in-Chief, *Encyclopedia of Retirement and Finance*, and author of *10 Secrets to Successful Home Buying and Selling*

A Public Conversation – *Building Senior Housing for 21st Century Boomers*
- Moderator, Rick Moody, Ph.D., Director, AARP Office of Academic Affairs
- Steven D. Bell, Chairman & CEO, Steven D. Bell & Company
- Nathan Jameson, Senior Investment Officer, Traditions Capital
- Laurie Ringaert, Director, Office of Research, School of Public Health, UNC Chapel Hill

- Understanding Boomers as a generation, from needs to markets
- Lessons from other 21st Century “Silver Industries”
- Aging services and residential development
- Integrating finance, architectural design, and marketing

Buffet luncheon sponsored by Steven D. Bell & Company and The Bryan School of Business and Economics at UNCG.
Please enjoy visiting exhibitors!

The Duke SMART HOUSE
- Tom Rose, Director, the Duke SMART HOUSE, Pratt School of Engineering, Duke University

Boomers and Markets
- Matt Thornhill, President, The Boomer Project

Residential Design for Aging Boomers
- Tommy Lambeth, Chair, Department of Interior Architecture, UNCG

Announcing Waters of Life, the first biennial UNCG Senior Housing Design Student Competition

- A statewide juried graduate student competition
- Featuring a national panel of jurists
- Focusing on residential needs and choices of aging Boomers Aging in Place
- Providing monetary and prestige awards

Closing Remarks – Janice I. Wassel, Ph.D., RFG, Director of the Gerontology Program and Co-Director of the MS in Gerontology-MBA Dual Degree Program, UNCG
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Steven D. Bell

Steven Bell grew up in Raleigh, NC, graduating from the University of North Carolina. After several years in mortgage banking and six years as the top salesman with Richardson Corporation in Greensboro, NC, he formed his own company, Steven D. Bell & Company in 1976. Since its formation, the company has handled over $2 billion in acquisitions and dispositions and managed or sold nearly 50,000 apartment units and 9.5 million square feet of shopping centers. The company’s current management portfolio consists of more than 19,200 apartments, 2.9 million square feet of retail and commercial space, and 18 assisted living facilities. Bell employs over 1000 employees and is one of the largest real estate investment advisors in the Southeast, buying or selling $567 million of investment properties last year. The company manages properties with a collective value of over $2.1 billion.

Steve Bell has twice been a finalist for Real Estate Entrepreneur of the Year in NC and is CEO of Steven D. Bell & Company. He is regional Board Chairman of Wachovia Bank, Past-President of North Carolina Beta Foundation, Director of Griffis/Blessings, Inc., and serves on the UNC-Chapel Hill Kenan-Flagler Board of Visitors and Greensboro College Board of Trustees.

Neal E. Cutler, Ph.D.

Neal E. Cutler is the Associate Director of the UNCG Gerontology Program at the University of North Carolina at Greensboro. His current teaching and research interests focus on the connections among aging, business, and financial services in the context of generational change and family dynamics. Previously he held the Boettner/Gregg Chair in Financial Gerontology at Widener University in Chester, Pennsylvania, where he was Professor, School of Business Administration, and Professor, School of Human Service Professions. From 1973 to 1989 he held a joint appointment as Professor of Political Science and Professor of Gerontology at the University of Southern California, and was Associate Director of the USC Andrus Gerontology Center’s Institute for Advanced Study in Gerontology and Geriatrics.

Dr. Cutler is also Vice President and Dean of Educational Programs of the American Institute of Financial Gerontology (AIFG), a professional educational partnership with the American Society on Aging and UNCG. AIFG provides specialized gerontological training to qualified financial services professionals leading to the Registered Financial Gerontologist™ (RFG) designation (www.aifg.org).

In 2007 Dr. Cutler was named a Fellow of the TIAA-CREF Institute. In 2006 he received the Cavanaugh Award for Excellence in Education and Training in Aging from the American Society on Aging. In 2005 he was appointed as Coordinator of the Aging and Business Education Initiative of the AARP Office of Academic Affairs. In 2003, he was elected a Fellow of the Association for Gerontology in Higher Education (AGHE), and is the co-chair of AGHE ’s Task Force on Business and Aging. He is also a long-time Fellow of both the Employee Benefit Research Institute and the Gerontological Society of America.


Dr. Cutler was the Keynote Speaker at the 2004 Annual Meeting of British Society of Gerontology in London. He won Senior Fulbright Fellowships to Helsinki University (1972) and to Glasgow University (1988). In 1979-81, on leave from USC, he was a Professional Staff Member of the U.S. Senate Special Committee on Aging. necutler@uncg.edu
Speakers and Panelists continued …

Nathan W. Jameson

Nathan W. Jameson is the Senior Investment Officer for Traditions Capital, a Philadelphia-based private equity fund manager. Traditions Capital’s first fund was established to invest in homebuilders nationwide that provide homes and communities for mature buyers.

Prior to joining Traditions Capital, Mr. Jameson served as Assistant Director of Acquisitions and Development for Traditions of America, Pennsylvania’s leading developer and builder of active adult communities. He is active in the National Association of Homebuilder’s 50+ Housing Council, and was a charter member of Philadelphia’s regional 50+ Council, PennDel 50+. In 2006, 50+ Builder Magazine named Jameson one of the Top 50 Executives in 50+ Housing.

Mr. Jameson graduated Summa Cum Laude as an undergraduate double major in Political Science and Communication from the University of North Carolina at Greensboro (UNCG), where he was a 2-time NCAA Division I Academic All-American in Men’s Basketball, leading the team to the NCAA Tournament during his senior season. Mr. Jameson is a Phi Beta Kappa inductee and a former Rhodes Scholar Nominee.

Prior to moving to Pennsylvania, Mr. Jameson served as the Assistant Director for Action Greensboro, an economic development organization in Greensboro, North Carolina. He and his wife, Robyn, reside in Saint Davids, Pennsylvania. njameson@traditionscapital.com

C. Thomas Lambeth, M.L.A.

T. Thomas (“Tommy”) Lambeth is Associate Professor and Chair of the UNCG Interior Architecture Department. He holds a Master of Landscape Architecture and Bachelors of Product Design from NC State University.

Lambeth teaches Environmental Design, Design Graphics, Interior Design, and Advanced Interior Design. He continues a professional practice as Principal Designer of Designworks, consulting in landscape architecture, product design, environmental design, and graphics.

Lambeth has had recent exhibitions at The Stage Gallery in Merrick NY, Wake Forest University, the Greensboro Artists’ League, and the University of Oulu, Finland. His most recent activities and awards include Director of the Nordic Design and Scandinavian Studies Programs, University of Oulu School of Architecture faculty exchange, participation in the Design Path Workshop in Kajaani Finland, and twice he has received the Outstanding Teacher Award in the UNCG School of Human Environmental Sciences. tom_lambeth@unCG.edu

Harry R. Moody, Ph.D.

Harry R. (“Rick”) Moody is Director of Academic Affairs for AARP in Washington, DC. He also serves as Senior Associate with the International Longevity Center-USA and Senior Fellow for Civic Ventures. Dr. Moody previously served as Executive Director of the Brookdale Center on Aging at Hunter College and Chairman of the Board of Elderhostel.

Dr. Moody is the author of over 120 scholarly articles, as well as a number of books including: Abundance of Life: Human Development Policies for an Aging Society (Columbia University Press, 1988); Ethics in an Aging Society (Johns Hopkins University Press, 1992); and Aging: Concepts and Controversies, a gerontology textbook now in its 5th edition and ranked by Amazon.Com as the best-selling aging textbook in print. His most recent book, The Five Stages of the Soul, was published by Doubleday Anchor Books (2007) and has been translated into seven languages worldwide.

A1967 graduate of Yale with a Ph.D. in philosophy from Columbia University in 1973, Dr. Moody taught philosophy at Columbia, Hunter College, New York University, and the University of California at Santa Cruz. From 1999 to 2001 he served as National Program Director of the Robert Wood Johnson Foundation’s Faith in Action and, from 1992 to 1999, was Executive Director of the Brookdale Center at Hunter College. Prior to that, he served as Administrator of Continuing Education Programs for the Citicorp Foundation and later as Co-Director of the National Aging Policy Center of the National Council on Aging in Washington, DC. hrmooody@yahoo.com
Speakers and Panelists continued ...

Laurie Ringaert BSc, BMR-OT, MSC

Laurie Ringaert is Director of the Office of Research, School of Public Health, UNC-Chapel Hill. She is a Senior Research Associate of the Canadian Centre on Disability Studies and is President of Universal Design International Consulting. Previously Ringaert served as Director of the Center for Universal Design, College of Design, NC State University and with the Universal Design Institute, Faculty of Architecture, University of Manitoba. She has been involved in accessibility/universal design/aging/disability issues for over 25 years and has been a researcher, consultant, educator, trainer, expert witness, author, building codes developer and policy analyst. Ringaert has created and provided many training/capacity building courses and policy developments on universal design in Ukraine, Russia, for the Canadian Department of National Defense and others. She is currently directing a project on Visitable Housing in Canada (www.visitablehousingcanada.com). Through this project she is organizing a National Think Tank on Visitable Housing which will result in a National Framework of Action.  laurie.ringaert@unc.edu

Tom Rose

Tom Rose is a 2005 Duke University Pratt School of Engineering graduate in Biomedical Engineering and serves as the Program Director for the Home Depot Smart Home, created by the Pratt School of Engineering at Duke University. The 6,000 square foot Home Depot Smart Home, part of a Duke Engineering Living Technology Advancement project, creates a dynamic “living laboratory” environment that contributes to the innovation and demonstration of future residential building technology. The central concept of this project is a belief that smart homes can improve that quality of life for people of all ages and incomes.

Tom has been working with this project since conceptualization, with Mark Younger. He manages student project teams, directs project research, advises the architecture, design, and construction process, is responsible for curriculum integration, and serves as the main point of contact for questions from the public and industry.  Tom.rose@duke.edu

Matt Thornhill

Matt Thornhill is Founder & President of The Boomer Project. After a 23-year career in advertising, Matt, 47, quickly established himself as a leading national authority on Boomers. His opinions and insights are sought by reporters for national magazines like BusinessWeek and Money, newspapers such as The Washington Post and Minneapolis Star-Tribune, National Public Radio’s “All Things Considered” and NBC Nightly News.

Thornhill’s background with advertising firm Ogilvy & Mather, and Ted Bates in New York, the Martin Agency in Richmond, and running his own interactive agency in Atlanta during the dot com boom, means that Matt understands both consumer behavior and trends. Over the years Matt has worked on brands like Coca-Cola, Mercedes-Benz, AT&T, Kraft General Foods, Colgate, Marriott, Seiko and others. He is responsible for overseeing the work for clients by the Boomer Project, as well as editing the national research reports and the monthly newsletter.  matt@boomerproject.com.
Speakers and Panelists continued …

Lois A. Vitt, Ph.D.

Lois Vitt is author of 10 Secrets to Successful Home Buying and Selling: Using Your Housing Psychology to Make Smarter Decisions and other books and articles that describe the psychology behind how and why consumers make the housing and other financial life decisions they do. Dr. Vitt also is founding director of the Institute for Socio-Financial Studies (ISFS) in Middleburg, VA where she directs research and consults for organizations about consumer financial decision-making and consumer financial education. She is Editor-in-Chief of the 2 volume Encyclopedia of Retirement and Finance and Co-Editor of the Encyclopedia of Financial Gerontology. Prior to founding the Institute, Dr. Vitt was a real estate syndicator and mortgage banker, investment banker, and an executive in financial services and real estate companies. She has an Executive MBA from Pace University in New York and MA and Ph.D. degrees in social psychology from the American University in Washington, DC. lvitt@isfs.org

Janice I. Wassel, Ph.D., RFG

Janice I. Wassel is Director of the Gerontology Program and a member of the Department of Sociology faculty at The University of North Carolina at Greensboro. Dr. Wassel holds a dual degree from The Pennsylvania State University in Demography and Sociology. She was the recipient of both pre-doctoral and postdoctoral NIA training grants and completed an NIA internship. Dr. Wassel is also a Registered Financial Gerontologist and teaches for the American Institute of Financial Gerontology (AIFG).

Dr. Wassel’s gerontology research interests focus on: the Senior Sandwich Generation, the Sociology of Finance, how couples and families make decisions about retirement timing, post-retirement employment after forced retirement and financial allocation decisions, cohort studies, pension wealth, the relationship of family caregiving and depression, and family structures and decision-making in caregiving relationships. Dr. Wassel is widely known for her innovative curriculum development activities as a founding member of the North Carolina Gerontology Consortium and in creating interdisciplinary courses with nursing, communication science, nutrition, and social work faculty. Dr. Wassel has been centrally involved in the creation of the Dual Degree MS in Gerontology – MBA program at UNCG.

Dr. Wassel’s publications have appeared in the Journal of Financial Service Professionals, NAELA Quarterly, Social Forces, Research on Aging, The Gerontologist, and Journals of Gerontology, as well as a number of book chapters and reports.

Dr. Wassel is a member of AARP’s Aging and Business Education Initiative national advisory board and is actively involved in several professional associations, including the Population Association of America, the Gerontological Society of America, the Association for Gerontology in Higher Education (AGHE), the Southern Gerontological Society, and the American Society on Aging. She serves on several committees and boards of these organizations, including the AGHE Business and Aging Task Force and the Southern Gerontological Society. Dr. Wassel was the managing editor of Research on Aging and the current editor of the Sigma Phi Omega newsletter for AGHE. Active in her state and community, Dr. Wassel serves on the North Carolina Western Chapter’s Alzheimer’s Association Executive Board, Orange County Advisory Board on Aging, the Human Services Advisory Commission, and the Senior Services of Guilford Advisory Board. jiwassel@uncg.edu
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People over 50 are so set in their ways they won’t ever read this ad.

It’s too small. They’ll need their “cheaters.”

Not to mention that they’ve already made all their brand choices; they won’t try anything new. Ads don’t work for them.

If that were true, then everyone over 50 would still be wearing Hush Puppies, driving Oldsmobiles and shopping at Roses. Consumers over 50 are still making purchase decisions. But marketers have traditionally put all their eggs in the basket of 18-to-49 year-olds. Once a consumer turns 50, the courtship is over. Most marketers see someone over 50 as no longer a viable, vibrant opportunity for a sale (unless they’re selling Cadillacs, Polident, Viagra or Depends).

With Baby Boomers at 50 and now even 60, the definition of “old” is getting older. A recent cover of AARP’s magazine shouted “60 is the new 30.” Actually, Boomers are making 60 the “new 50.” They are changing forever how one grows old in America.

Billy Crystal is 59. Robin Williams is 54. Howard Stern is 53. While you can’t argue with their age, you also can’t call any of them “mature.” Much less “senior.” They are the new face of the “over 50” market. And we dare you to ignore them.

The statistics about this group are staggering. By 2010, the Boomers over 50 will number some 60 million strong. They control 70% of the nation’s not worth. They are at their peak earning years. They have more disposable income ready to spend than any other age segment.

Plus, they’re growing by 10,000 new members every day. If you’re a marketer, the easiest way to grow your business over the next 20 years is to target today’s Boomer.

The best way to do that is to talk with us. We’re the Boomer Project, and we’ve partnered with SIR Research to study today’s Boomer Consumer and how they respond to marketing and advertising messages. We help companies and organizations figure out how to better understand today’s Boomers. So far we’ve helped companies like Pfizer, Hershey’s, Samsung and Genworth Financial, and organizations in healthcare, financial services, travel & tourism and real estate.

Along the way we’ve learned a few things about today’s Boomers. For one, we know they want more information, not less. That means they’ll read this ad.

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Visit Irving Park's finest senior living community today and see how we're Making A Difference Every Day!

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Aging Workforce Research

At the UNC Institute on Aging, one of our priority research areas is workforce issues related to aging. Most of the projected growth in the labor force between 2000 and 2050 will be composed of workers aged 55+. This aging of the workforce will have a major influence on the organization of work and the demand for particular services. Ongoing research at the Institute on Aging focuses on how this trend may influence or complicate work experiences, recruitment, retention, careers, and the situation of older workers. Our goal is to understand and inform the future workplace.

Resources we offer include:

- a strong research program on human resources management issues of an aging workforce
- labor force forecasting, especially in the health field
- extensive research experience in long-term care and continuing care retirement communities