



# Protecting Elder Americans from Financial Abuse

## Free Advice and Guidance on How to Protect Yourself and Your Loved Ones Against Investment Swindles and Financial Abuse.

Thursday, November 10, 2011 • **from 6:00 a.m. to 3:00 p.m. PST**

One out of every five citizens over the age of 65 have been victimized by a financial swindle. Of particular concern are seniors with mild cognitive impairment (MCI) who can perform most daily functions, but have trouble or become confused when it comes to managing their finances.

In collaboration with several national organizations, Kiplinger is coordinating a toll-free nationwide call-in service for individuals seeking advice. From 9:00 a.m. to 6:00 p.m. Eastern time on Thursday, November 10, members of the Financial Planning Association, National Adult Protective Services Association and health care professionals will answer your questions.

### General Finance Questions **888-227-1776**

Call the above number to speak with an expert from the Financial Planning Association® (FPA®) about your family's financial security. You can get answers to general financial questions, get help identifying financial professionals that put your interests first and learn how to protect yourself and your loved ones from financial fraud. FPA professionals can also help you start a conversation about money with your adult children or older parents to help prevent elder investment fraud and financial exploitation.

### Medical Questions **888-303-0430**

Call the above number to speak with a health care professional about medical issues such as mild cognitive impairment (MCI) that can impact an older person's ability to make wise and safe financial decisions and can increase their vulnerability to elder financial abuse and exploitation. The health care professionals can help you recognize the warning signs of vulnerability to financial abuse in yourself or your loved ones and suggest referral routes for further medical screening.

### Financial Abuse Questions **888-303-3297**

Call the above number to speak with an adult protective services (APS) professional about elder financial abuse and strategies for keeping yourself or your older loved ones independent. You can get information on how to recognize the most common ways that older adults are financially exploited and methods for preventing elder financial abuse. APS professionals can also help you take the proper steps if you suspect that a loved one is currently being financially abused or exploited.



This call-in service is for informational purposes only and is not a substitute for individualized medical, law, business, accounting or investment advice which takes into account the details of your situation or condition. Always seek the advice of your lawyer, physician, accountant or other qualified professional regarding your individual situation or condition. Reliance on information provided by the call-in service is solely at your own risk. In no event shall The Kiplinger Washington Editors, Inc., Investor Protection Trust, Investor Protection Institute, Financial Planning Association, National Adult Protective Services Association, Baylor College of Medicine or any participating adult protective services, medical or health care professional be liable for any decision made or action taken by you in reliance on or in connection with your use of the call-in service.

# Elder Investment Fraud and Financial Exploitation National Call-in on November 10, 2011!

For more information on the call-in, see the reverse side of this flyer and the November 2011 issue of *Kiplinger's Personal Finance* magazine.

**Pocket Guide on Elder Investment Fraud and Financial Exploitation**

Should I be concerned?

**Red Flags in patient/client history:**

- Social Isolation
- Bereavement
- Dependence on another to provide care
- Financially responsible for adult child or spouse
- Alcohol or drug abuse
- Depression or mental illness

**Red Flags from clinical observations:**

- Cognitive problems
- Fearful, emotionally labile, or distressed
- Suspicious, delusional
- Change in appearance, poor hygiene
- Accompanied by caregiver who is overly protective; dominates patient/client
- Change in ability to perform activities of daily living, including self-care, daily finances, medication management








**Patient Education**



Learn how  
to protect yourself  
and your family from  
senior financial exploitation






Learn how state securities regulators, health care professionals and adult protective services professionals are working together to protect seniors from financial abuse through the Elder Investment Fraud and Financial Exploitation (EIFFE) Prevention Program at [www.investorprotection.org//learn/?fa=eiffe](http://www.investorprotection.org//learn/?fa=eiffe)

The website includes information on the EIFFE Prevention Program, a video on elder investment fraud, recent IPT research and the *Clinician's Pocket Guide* and *Patient Brochure* (shown above) created for the program.

