

Protecting Alberta Seniors: Financial Concerns Checklist

CHECKFIRST



Should I be concerned?

Are you, or a senior you know experiencing any of the following financial issues or concerns? (please check all that apply)

- I have recently assumed control of my finances for the first time.
- I don't feel confident in making financial decisions alone.
- I have trouble paying bills because the bills are confusing to me.
- I don't understand the financial decisions that someone is making for me.
- My children or others around me are pressuring me to give them money or make financial decisions I am unsure about.
- People are contacting me by phone, email or mail asking me for money.
- Money seems to be disappearing from my accounts. I think someone may be accessing them without my permission.
- I'm considering making an investment, but I am being pressured to provide personal information such as my credit card number, drivers licence and social insurance number.
- I don't receive regular financial statements for my bank accounts and/or investments.
- I do receive regular financial statements for my bank accounts and/or investments but don't review and/or understand them.
- I have trouble getting in touch with my financial adviser or person who takes care of my finances.
- I have been forced or am being pressured to sign over my power of attorney or change my will.

If you checked any of the boxes above and are concerned about your finances, help and resources are available. Speak to someone you trust, such as a friend, doctor, accountant or lawyer; call the police or the Alberta Securities Commission (1-877-355-4488). Remember: it's your money.

Adapted for use by the Alberta Securities Commission, with the permission of the Financial and Consumer Services Commission of New Brunswick.