Financial Concerns Checklist

Don’t be at risk of elder financial abuse. This checklist will help you start a conversation if you are concerned about the financial well-being of your parents or a senior close to you, or if you suspect they may be suffering financial abuse.

Are you having any of the following common financial concerns?

☐ I have trouble paying bills because the bills are confusing to me.

☐ I don’t feel confident making big financial decisions alone.

☐ I don’t understand financial decisions that someone else is making for me.

☐ I give loans or gifts more than I can afford.

☐ My children, or others around me, are pressuring me to give them money.

☐ People are calling me or mailing me asking for money.

☐ Someone is accessing my accounts. Money seems to be disappearing from my accounts.

☐ Someone is cashing my pension, insurance or other cheques without permission.

☐ Someone has forced me to sign over control/power of attorney, sell my house or change my will.

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