

# Protecting Alberta Seniors: Financial Concerns Checklist



## 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.**

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