

Protect Yourself and Family from Elder Financial Fraud

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Where today's experts help you secure retirement.

Nine Steps to Protect Yourself

- Put all phone numbers on DO NOT CALL List 888-382-1222
- Do not accept calls from any person you don't know. Use caller ID
- Never give out personal information in response to emails or calls
- Never wire money to strangers under any circumstances
- Review your financial statements monthly
- Consider using a reputable bill paying service
- Monitor your credit report 877-322-8228
- Use caution when utilizing joint accounts
- Execute a Durable Power of Attorney only with someone you trust

Hold a Family Meeting

- Ask an advisor or non-family member to facilitate
- Create an agenda to share with your children; don't include spouses unless necessary
- Discuss your plans for the future
 - Retirement Plans
 - Long-term Care Plans
 - End-of-Life Plans
- Create a "to do" list for items you will need help with
- Follow-up six months later

Create a Lifefolio

- List all your investment and bank accounts and their account numbers
- List all your advisors and their contact information
- List all insurance and annuity accounts and beneficiaries for each, and inform beneficiaries
- List all your internet accounts with usernames and passwords
- List all your legal documents and where they are located
- You cross out or keep items based on your preferences



Bob Mauterstock, CFP®, ChFC, CLTC, is an accomplished speaker, author and sought-after authority on the financial concerns of baby boomers and their adult children. For over 35 years, Bob has helped families achieve a worry-free, comfortable retirement. He has inspired baby boomers and their adult children to give each other the gift of communication and preserve their legacy for future generations. In 1987 he qualified as a Certified Financial Planner® and became a specialist in retirement income planning, long term care planning, investment management and legacy planning. Bob speaks to a wide range of audiences through workshops, trainings, meetings, and consultations, as well as doing presentations for organizations and corporations. You can read more about Bob and his work on his website and through his blog on GiftofCommunication.com.

For more information about this and other Retirement Smart courses, visit www.retirement-resource-center.com or "Retirement Smart" on Facebook..

Action Plan

1. Put all phone numbers on the national DO NOT CALL List 888-382-1222.
2. Monitor your credit report.
3. Create or update your Lifefolio. [Click here for a sample template.](#) (Note: this is not an endorsement of the products or services of this financial services company)
4. Designate a trustworthy Durable Power of Attorney Agent. Complete a [Five Wishes Advance Directive](#).
5. Hold a family meeting at least once (preferably once a year) and ask a trusted, impartial, non-family member to facilitate



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BEFORE, AT AND DURING YOUR RETIREMENT

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