

SILA Protecting Senior Clients from Exploitation

19,897 words = 3 CE Credits

Chapter 1 Senior Vulnerability

Introduction

The Advisor-Client Relationship is the First Line of Defense

Reporting Rules and Laws - An Overview

Address Advisor Hesitation with Education and Training

Senior Vulnerability - Not All Seniors Are the Same

The Impact of Declining Mental Cognition on Financial Capacity

Review Questions

Chapter 2 Financial Abuse and Exploitation

Introduction

Senior Abuse Facts

Senior Financial Exploitation

Undue Influence

The Abusers and Their Scams

Review Questions

Chapter 3 Detection, Reporting, Laws, and Regulations

Introduction

Detection

Regulations, Rules, Laws, and Protection Agencies

Adult Protective Services

Producer Conduct When Working with Seniors

Developing Best Practices and Procedures

Review Questions

Resources

Review Questions Answer Key