

# Senior\$afe Quick Response Chart

## If you are suspicious

- Inquire about the activity if inconsistent with consumer's normal behavior
- Suggest an alternative to large cash withdrawals
- Make consumer aware of ways to limit risk of joint accounts
- Check documentation of the third party (e.g., power of attorney)
- Contact the appropriate person in your compliance department

## If you suspect coercion in the presence of a third party

- Separate the senior from third party by ushering him or her to another location on the pretense of discussing private account information
- Contact the appropriate personnel at your firm

## If you are still suspicious or if you fear senior is in immediate danger

- Always contact the appropriate personnel at your firm who will decide next steps
- Report to elder abuse hotline or call 911

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