

RE: [older adult's name] _____

To whom it may concern:

Based on information from the adult sharing this letter with you our Friends and Family Questionnaire, on the olderadultnestegg.com site, indicates that their older adult loved one may be showing impairments in financial decision-making or experiencing vulnerability with regard to finances and maybe a risk for financial exploitation.

[signature line] _____

Concerned Family or Friend {name}

Today's Date

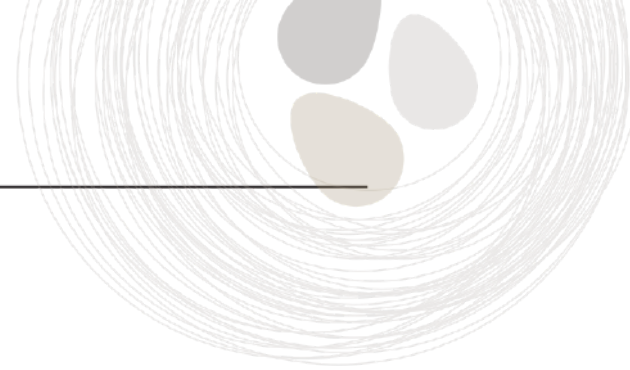
Do you have a evidence-based tool to assess financial decision-making capacity in your older adult clients? This letter is to make you aware that on our website, we have online training, certification and tools for professionals aimed at evaluating an older adult's financial decision-making skills. A risk score and suggested next steps are part of the report generated on the site. These trainings and tools can be used at no charge to the professional. All of our scientific publications and clinical papers can be found on the resource page of the website as well. Visit our website at www.OlderAdultNestEgg.com.

We hope that this site may be useful to you and will help you protect this older adult's financial health.

Dr. Peter Lichtenberg

Ph.D., Professor of Psychology and Physical Medicine and Rehabilitation, Director, Gerontology Institute Wayne State University, national expert in Financial Capacity Assessment and Financial Exploitation of Older Adults.

Initial studies confirm the Lichtenberg Financial Decision-Making Screening and Rating Scales (© 2014) reliably profile older adults' vulnerability to fraud and ability to manage money. The screening tool uncovers whether a person may be currently under undue influence, be psychologically susceptible to outside influence, or unable to make sound, rational financial decisions. The rating scale determines whether the older adult understood the financial decision and made it with integrity, not whether the decision was wise. *"Older adults, like all adults, have the right to make poor financial choices,"* Dr. Lichtenberg said. *"We need to assess whether the decision was authentic."*



"I use Dr. Lichtenberg's financial capacity screening tool in my elder law practice. It provides a structure for interviewing clients and assists attorneys negotiating the fine line between maintaining the client's independence and protecting them." Caroline Dellenbusch, J.D. Elder Law and Estate Planning Attorney, Past Chair Elder Law and Disability Rights Section of State Bar of Michigan, completed 40-hour specialized Elder and Guardianship Mediation Training

"Dr Lichtenberg's research and cutting-edge assessment tools on financial decision making by older adults has raised my awareness and enhanced my toolbox. This is essential preparation for any mediator in meeting their ethical obligation to ensure that the mediations they offer provide meaningful opportunities for self determination." Dale Ann Iverson, J.D., JustMediation PLC, Past Chair ADR Section State Bar of Michigan, listed in Super Lawyers and Best Lawyers in Mediation and Arbitration



Older Adult Nest Egg assessments provide information only about financial decision-making performance. Assessment results detail the client's responses to a specific financial decision or transaction. They assist the interviewer only in identifying potential areas of strength or challenge regarding that decision or transaction and as informed by the interviewer's independent judgment. Assessments DO NOT provide diagnosis or treatment recommendations. Older Adult Nest Egg assessments are to be conducted by trained interviewers. Assessment reports are not stand-alone and require the interpretation of the interviewer and possibly a relevant professional within their scope of practice and in the context of all the information they have gathered about their client. Assessments, risk scores and levels of concern are not intended to diagnose, treat or prevent cognitive impairment. Information provided by Older Adult Nest Egg is not a substitute for face-to-face consultation with a medical or mental health professional and should not be construed as individual medical or mental health advice. Older Adult Nest Egg assessments and the statements made on this website have not been evaluated by other regulatory bodies.

www.OlderAdultNestEgg.com is brought to you by The Institute of Gerontology at Wayne State University