

# Senior Financial Safety Tool

## TRAINING PLAN

The SFST is a web-based tool that empowers financial institutions, community partners, and older adults themselves, to detect risk(s) of financial exploitation in older adults and to connect them with resources. There are two versions available: a version for professionals to use and a self-assessment version.

*The SFST can be accessed at:* <https://probononet.neotalogic.com/a/sfst>

The SFST is meant to connect seniors with person-centered services and provide consumer rights & referral information related to the preservation of overall financial health. Our goal is minimize risk factors that may lead to financial exploitation and provide advocacy for older adults who have been victimized.

This tool gives you the option to make a referral to the Center for Elder Law & Justice for prompt follow-up and action.



*Training videos can be accessed at:*

[https://www.youtube.com/playlist?list=PLyNI\\_xg8tlq3qQWa0apWbs1-OZKFq4s3m](https://www.youtube.com/playlist?list=PLyNI_xg8tlq3qQWa0apWbs1-OZKFq4s3m)

*If you are unable to access YouTube, training videos can be emailed to you directly.*

There are three training videos and we recommend that they be viewed in the following order:

1

### Financial Exploitation (FE) Training

*provides an overview on financial exploitation, conditions that increase risk, how to detect suspicious activity and handle difficult conversations with customers.*

2

### Senior Financial Safety Tool (SFST) Training

*provides an overview on how to navigate the tool itself.*

3

### Scams

*provides an overview on scams related to the COVID-19 pandemic and how we can protect seniors from further financial exploitation.*

Once these training sessions are complete, a brief survey will be sent to all trainees. Follow up surveys will follow, so it is critical that the Center for Elder Law & Justice is notified at this stage so that the surveys can be emailed in a timely manner. Staff should print (or save as a pdf) the final page of the survey to confirm completion. Staff can also screenshot the final page as proof of completion.

## FOLLOW UP

Your feedback is appreciated. If you have any questions or concerns you can email [sfst@elderjusticeny.org](mailto:sfst@elderjusticeny.org) or contact Erin Riker at [eriker@elderjusticeny.org](mailto:eriker@elderjusticeny.org).

*Additional Zoom trainings can be conducted if staff have questions regarding how to use the tool with customers or clients.*

Ongoing training and support will be provided to all users.



438 Main St, Ste 1200  
Buffalo, NY 14202  
(716) 853-3087  
[elderjusticeny.org](http://elderjusticeny.org)