



Older Adult Financial Exploitation Subject Matter Expert (SME) Expectations

Each task force member or SME must have completed the following:

- Completed all four hours of training
- Taken all three certifications on www.olderadultnestegg.com
- Feel comfortable fielding and directing questions
- Answer questions about the Natural Risk Rating Form
- Be comfortable answering general questions regarding the assessment
 - i.e. – What kind of financial transaction?
 - Recent purchase or think of a purchase you may make in the future
- An email group has been set up for sharing questions and information within the group it is oafe@michiganlegacycu.org
- When in doubt DON'T guess ask
- Flyers are available for staff information and to provide to member/owners
- SME's will be interviewed individually by Carma and discuss expectations and responsibilities