

FINANCIAL VULNERABILITY ASSESSMENTS

As accredited and experienced financial vulnerability assessors, we're here to help families and professionals protect the most vulnerable, whether you're concerned about a loved one or you have a client to safeguard.

Our person-centred, evidence-based assessments are designed to determine the quality and soundness of an individual's financial decision/s. Giving you the reassurance of knowing whether or not a financial transaction should go ahead.

By taking a therapeutic approach and working sensitively with each individual and their family/friends, we help the person being assessed to gain an insight into their potential vulnerability, while gathering valuable evidence to support future decision-making.

A CAREFUL, COMPREHENSIVE THREE-STEP APPROACH

To gain a true representation of each individual, we're trained and accredited to use the Lichtenberg Financial Vulnerability interview model, a highly regarded, research-based, three-step approach to financial assessment.

Our person-centred approach to financial vulnerability means we can empower the individual to protect themselves from risk, without oppressing their decision-making rights.

1. The Financial Decision Tracker (FDT) is a short, base assessment that looks at a financial decision in the context of the individual's values – from the choice they're making and the rationale behind it, to their understanding and appreciation of the outcome. From this, we identify their initial risk rating and if a more in-depth assessment is needed.

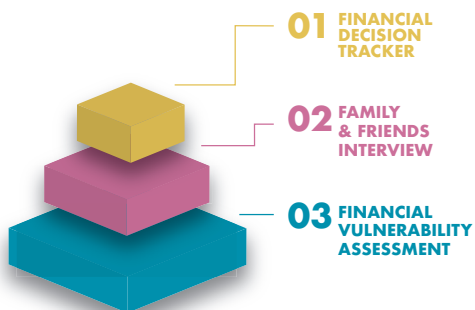
2. The Family & Friends Interview (FFI) is a structured, multiple choice interview with the individual's relatives/s, friend/s and/or trusted professional/s designed to elaborate on the FDT. The risk scoring system identifies how concerned interviewees are about the individual's financial decision-making and vulnerability to financial exploitation, enabling us to refine the individual's risk rating.

3. The Financial Vulnerability Assessment (FVA) looks in-depth at the intellectual factors involved in financial decision-making (choice, rationale, understanding and appreciation), alongside contextual factors.

For instance, are there people influencing the individual's finances and decisions, and how susceptible are they to these influences?

Contextual considerations can overwhelm intellectual factors and impair a person's judgement and ability to make decisions.

From this, we confirm the person's risk rating and provide our final assessment, helping you to support your loved one or client with their finances, in a way that protects their best interests.



**GET IN TOUCH TO SEE
HOW WE CAN HELP**

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