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WISCONSIN FINANCIAL ABUSE SPECIALIST TEAM (FA\$T)

TOOLKIT



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INTRODUCTION TO THE TOOLKIT

Purpose of the Toolkit

This Toolkit facilitates the development, evolution, and sustainability of Financial Abuse Specialist Teams (FASTs) in Wisconsin; it offers resources and tools to support existing and new FASTs to review cases and support clients of financial exploitation and abuse of older adults. Provided resources contain an asterisk (*) and are found at the end of this Toolkit. Many of the resources are designed to be customized for your specific FAST and were collected through research, a statewide FAST committee, and contributions from past and present FAST coordinators nationwide including those in Wisconsin.

These materials help build a solid foundation for Wisconsin FASTs by providing common mission and vision statements, team objectives, recruitment details, team structure, case details, meeting protocol, and a team evaluation. Additional resources and templates are provided to assist Wisconsin FASTs in building and personalizing their team to best meet the needs of their specific demographic.

INTRODUCTION TO FINANCIAL ABUSE SPECIALIST TEAMS (FA\$TS)

What is Financial Exploitation?

According to National Adult Protective Services (NAPSA), financial or material exploitation of a senior or disabled adult typically includes:

- The misuse, mishandling, or exploitation of adults' property, possessions, or assets.
- The use of another's assets without their consent, under pretenses, undue influence, or through coercion and/or manipulation.

Assets are commonly taken via forms of deception, pretenses, coercion, harassment, duress, and threats. Some commonly reported forms of financial exploitation reported to Adult Protective Services (APS) are theft, fraud, and real estate and other scams (*Financial Exploitation 2024*).

FA\$T Definition

A Financial Abuse Specialty Team (FAST) is a multidisciplinary team that works collaboratively to protect vulnerable and older adults against financial abuse and exploitation.

FASTs, comprising experts from various fields and sectors, aim to enhance safety and minimize distress and further financial harm to vulnerable and older adults as soon as possible. This is achieved through synchronized assessments of cases and customized interventions for each scenario. Typically, these teams are assembled and overseen by community-based or governmental entities with expertise in elder financial abuse and exploitation (Breckman et al., 2020).

Teams may consist of only public agencies such as Adult Protective Services (APS), Ombudsmen, law enforcement, and the Public Guardian, or they may consist of public and private partnerships to include private practitioners from law, real estate, and financial institutions.

Wisconsin FA\$T History

Comprising 72 counties divided into five Adult Protective Services (APS) regions, Wisconsin has three active Financial Abuse Specialist Teams (FASTs) as of October 2023. These three FASTs are in two APS regions, the Southeastern and Southern Regions; three of the five APS regions currently do not have an active FAST.

Because of the resources available to them, APS representatives have created and facilitated past and present FASTs. Co-chairs to run the FAST with at least one APS representative are encouraged; this will help to prevent facilitator burnout and balance the workload while maintaining accessibility to the resources available through APS.

The Need for FA\$Ts in Wisconsin

In 2020, Wisconsin was home to 1.45 million individuals aged 60 and above, making up a quarter of the state's population. This ranked Wisconsin 16th in the nation for this demographic and second among neighboring states. This represents a significant increase from 2010 when Wisconsin ranked 25th, with 19 percent of its population aged 60 and older. Over the decade, the 60+ population grew by 356,000, marking a 32 percent increase (*Wisconsin State Aging Plan FFY 2023-2025 draft*). With the increase in the 60+ demographic comes an increase in the need for services to address their needs.

Wisconsin is seeing a steady increase in reports of financial exploitation of older and vulnerable adults. From May 2020 to May 2024, Wisconsin's Elder Abuse Hotline received 1,551 reports of financial exploitation cases. Additionally, the Wisconsin Incident Tracking System (WITS) recorded 10,556 reports to other agencies. Consequently, older adults in Wisconsin have also seen a consistent rise in financial losses, with reported losses reaching \$31,591,294 in 2020 and escalating to \$43,357,979.06 in 2022. Of the over \$43 million lost in 2022, only \$2,815,788 was recovered for the clients (Wisconsin Department of Health Services, 2022).

Creating multidisciplinary teams is crucial to effectively safeguard older and vulnerable adults from financial exploitation. These teams bring together professionals from various organizations dedicated to serving this demographic. By pooling resources and expertise, these teams can coordinate efforts to protect individuals at risk and prevent future instances of exploitation.

MISSION, VISION, AND TEAM OBJECTIVES

Wisconsin FA\$T Mission Statement

The Wisconsin Financial Abuse Specialist Teams (FASTs) are multidisciplinary teams committed to addressing financial abuse, exploitation, and polyvictimization of adults at risk and older adults at risk. The purpose of these teams is to prevent financial abuse and exploitation and to improve the system's capacity to respond to the needs of victims in accessing support, advocacy, and services.

Wisconsin FA\$T Vision Statement

Our vision is to eliminate financial abuse and exploitation of adults at risk and older adults. This is done through creating a supportive multi-disciplinary team and sharing resources for team education, awareness, and a collaborative response that identifies and addresses gaps in the system.

Wisconsin FA\$T Objectives

- Promote outreach and educational initiatives on preventing financial abuse.
- Raise awareness of community trends in financial abuse for consumers and providers working with older adults in the community.
- Increase collaboration and coordination regarding improving system response to victims to promote more efficient and effective responses to victims of financial abuse.
- Gather comprehensive and precise information, and tap into a diverse range of expertise required for prosecuting elder abuse cases effectively.
- Address intricate cases and bolster the safety of victims.
- Promote best practice initiatives in prevention and response to elder financial abuse.

TEAM MEMBERSHIP

Common Membership

The FAST core membership should consist of multidisciplinary members who work collaboratively to advocate for older adult financial exploitation victims. FAST group support may also help to reduce secondary trauma effects that can be associated with challenging cases (MDT Guide and Toolkit 2024).

It is important to have a nice balance of membership and to consider who needs to be on the team over who wants to be on the team. Please reference the *Wisconsin FAST Partnerships & Glossary resource for descriptions of the role of each organization/agency.

It is also helpful to analyze individual agency roles, how the agencies work with their clients and other agencies involved in the system, and identify any gaps in service and any areas needed for increased collaboration or networking to increase your system's capacity to protect older and vulnerable adults from financial abuse. Please see *Wisconsin FA\$T Partner Map Example (Waukesha) for an example of how your FAST can personalize the *Wisconsin FA\$T Partner Map. This is a good resource for existing and new members. It may be helpful to schedule routine map reviews to keep them current.

After forming your core team, explore the idea of establishing specialized working groups to address specific aspects of your FAST formation that align with the professional expertise and interests of your team.

Adult Protective Services (APS) plays an essential role in the comprehensive response to neglect, abuse, and exploitation of adults. Consequently, the inclusion of APS representatives in multidisciplinary teams such as FASTs is deemed indispensable (Breckman et al., 2020).

Common Wisconsin FA\$T Membership Include

- Adult Protective Services (APS)
- Aging and Disability Resource Centers (ADRC)
- Corporate Counsel
- Department of Agriculture, Trade, & Consumer Protection (DATCP)
- Department of Financial Institutions (DFI)
- Elder Law Attorneys
- Financial Service Providers (guardian, daily money manager, etc.)
- Healthcare personnel (geriatrician)
- Law Enforcement
- Local Financial Institutions
- Managed Care ICA
- Medicaid Programs
- Prosecutor/District Attorney Personnel

Suggested Membership

Depending on the needs of your community, you may want to recruit the below agencies for your FAST.

- Ombudsman
- Disability Groups
- Private Investigators
- County Council on Human Trafficking
- Family Justice Center
- Financial Crime Investigators
- Area Agency on Aging
- Caregivers for elderly
- Missing Person Specialist
- Register in Probate Court Personnel
- Forensic Accountants
- IT Instructor (local higher education institute)

To Contact as Needed

Certain cases may necessitate specialized services. Here are some recommended organizations to explore.

- Dementia Care Specialist
- Economic Support Specialist
- Psychologists/neuropsychologists
- Hoarding Task Force
- Better Business Bureau (BBB)

NEW MEMBER ONBOARDING

Recruitment Idea

Bringing the right people to the table is essential for the success of your FAST. Consider the needs and resources of the community and recognize that some professions will be more challenging to recruit than others. Below are some resources to assist in the recruitment process. Resource items, including website URLs, are found at the end of the Toolkit.

- Share FAST mission/vision/objectives
- [*Vermont Video](#)
- *FA\$T Benefits Flyer
- [*AARP Report: \\$28.3 Billion a Year Stolen from Adults 60+](#)
- *FA\$T Recruitment/Event Flyer
- *Recruitment Invitation Letter
- [*NCALL Lifting Up Voices](#)

Member Onboarding

To onboard new members, cover the basics of your FAST. Review where members may locate resources and collect appropriate confidentiality paperwork such as the *Memoranda of Understanding (MOU).

Below is a suggested onboarding agenda for new members.

1. Signed *Memoranda of Understanding (MOU)
2. Present FAST history, mission, and vision statements
3. Describe the organizational structure of your FAST
4. Discuss each agency's representative and their contributions—see *Wisconsin FA\$T Partnership Glossary
5. Discuss *Wisconsin FA\$T Partner Map for your county or regional FAST. For an example of how to complete the template, please see *Wisconsin FA\$T Partner Map Example (Waukesha) in the Resource section.
6. Provide a copy of glossaries such as * Account Ownership Types & Glossary, *CRPB Financial Caregiver, and *The Department of Justice Glossary of Terms
7. Discuss and review policies and procedures
8. Describe case eligibility criteria
9. Describe how cases are investigated
10. Describe the *case referral, *case review, and case follow-up process
11. Describe channels of communication

FA\$T MEETINGS

Meeting Structure and Protocol

The FAST Coordinator assumes leadership responsibilities for the team, such as mobilizing resources, fostering communication among all team members, and serving as a primary point of contact for professionals seeking support with financial exploitation cases. This involves tasks like selecting cases for team consideration based on factors like severity, urgency, and complexity; leading team gathering; organizing information for case presentations and action plans; and addressing the team's data management and administrative requirements. Additionally, some coordinators offer case consultations, conduct training, and aid team members in preparing for case reviews (Breckman et al., 2020). See *Coordinator Checklist for additional roles and responsibilities of the coordinator.

The FAST coordinator distributes the meeting *Agenda to members at least one week before the meeting. The coordinator should provide clear information to presenters about the team's *case review process and emotional and technical support. If the meeting will be held virtually, send the *Zoom Tutorial pdf or *Teams Tutorial pdf to assist in troubleshooting potential issues.

When first creating a FAST, it is recommended to work on building your team and developing rapport before reviewing cases. During this time, members can share and learn about the different roles and responsibilities of each participating agency or organization and work to fill any identified gaps in membership. Reference the *Wisconsin FA\$T Partnership Glossary for details about common FAST members.

Once established, your team should review one to two cases per meeting. Presentations are also beneficial to members to better understand the function of other agencies, the trends in financial exploitation, and what is being done to combat them. *NCALL Lifting Up Voices website contains videos of older adults sharing their stories and each story has a discussion guide for group discussion.

Please see the 'Education' portion of this Toolkit for additional ideas on agencies to reach out to and potential topics for continued education.

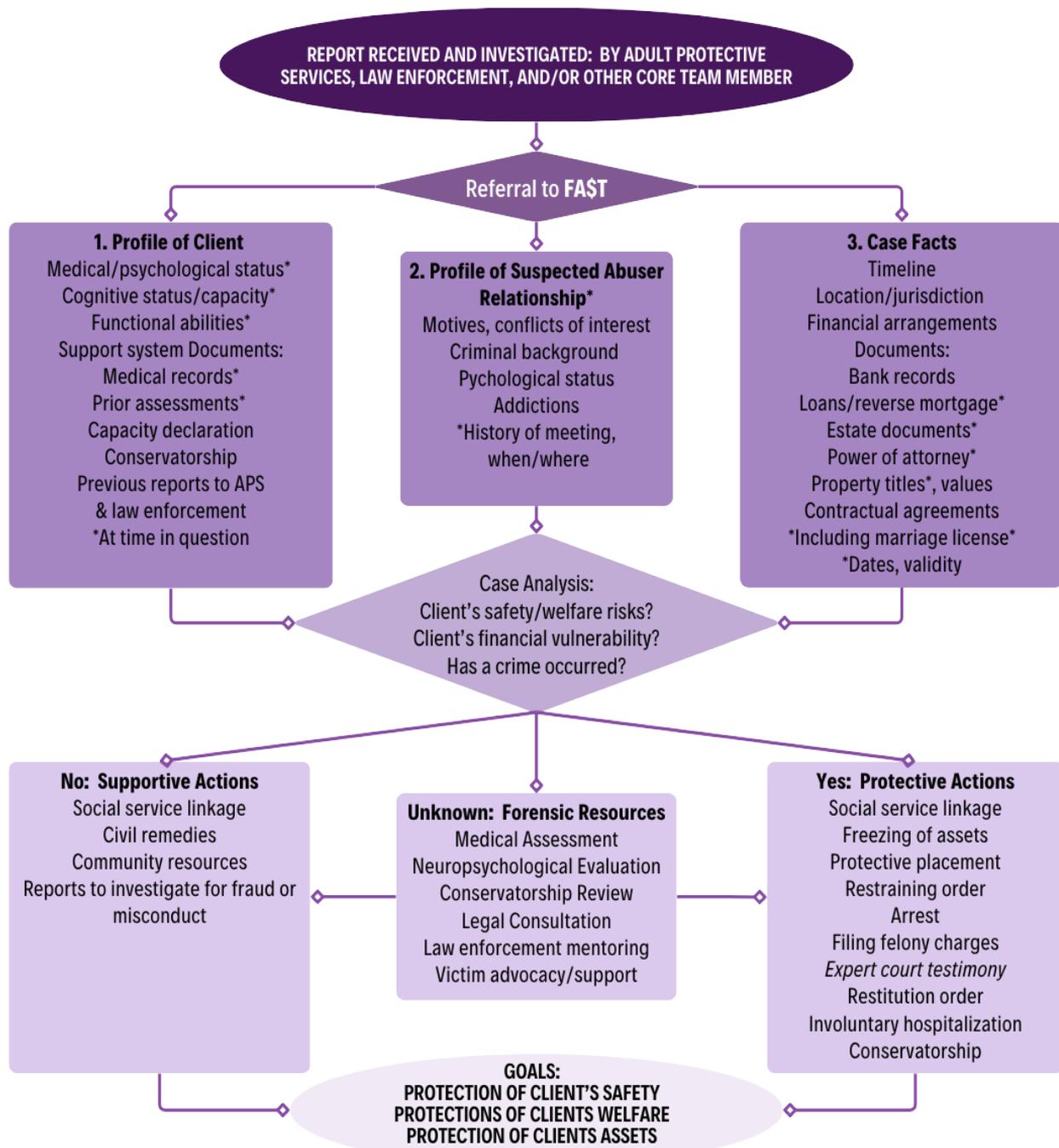
Suggested Meeting Structure:

1. Start Meeting (Introductions, admit to *Zoom, etc.)
2. Share the following via PowerPoint and read aloud as a reminder
 - Mission and Vision Statements
 - FAST Objectives
 - Confidentiality Reminder – Guests should fill out a *Confidentiality Form
3. Member updates
4. Previous case report(s)
5. Presentation and/or Case Consultation *case review (1-2 cases per meeting)
6. Complete *Lessons Learned
7. Announcements for the next meeting
8. Adjourn

CASE REFERRAL

*Case Referral Process

The FAST will review the case following the Case Referral Process below.



NCEA Issue Brief | Multidisciplinary Teams

Law Enforcement, Adult Protective Services (APS), and other appropriate agencies will respond to and investigate vulnerable or older adult financial exploitation cases. If needed, they will submit a *FA\$T Case Referral Form for FAST case review consideration (Flater & LaCaze, *Milwaukee County Enhanced Multi-Disciplinary Team 2023 2023*). The designated FAST entities will determine which cases are reviewed and triage the order in which they are reviewed.

CASE REVIEW

Case Review Benefits

There are many benefits to case review not only for the victim but also for the FAST members. Case review benefits are:

- Additional forms of vulnerable or older adult abuse may be uncovered.
- FAST members can learn from one another by viewing cases through the lenses of other professions.
- Duplication of effort is minimized through the division of work among members.
- Multiple agencies collaborating enhances feelings of competency and helps to create comprehensive and effective care plans for victims.
- FAST membership helps to facilitate relationship building which increases the chance of professional collaboration outside of meetings.
- Shared information helps provide a holistic view of the case which in turn results in a comprehensive approach to the issue.

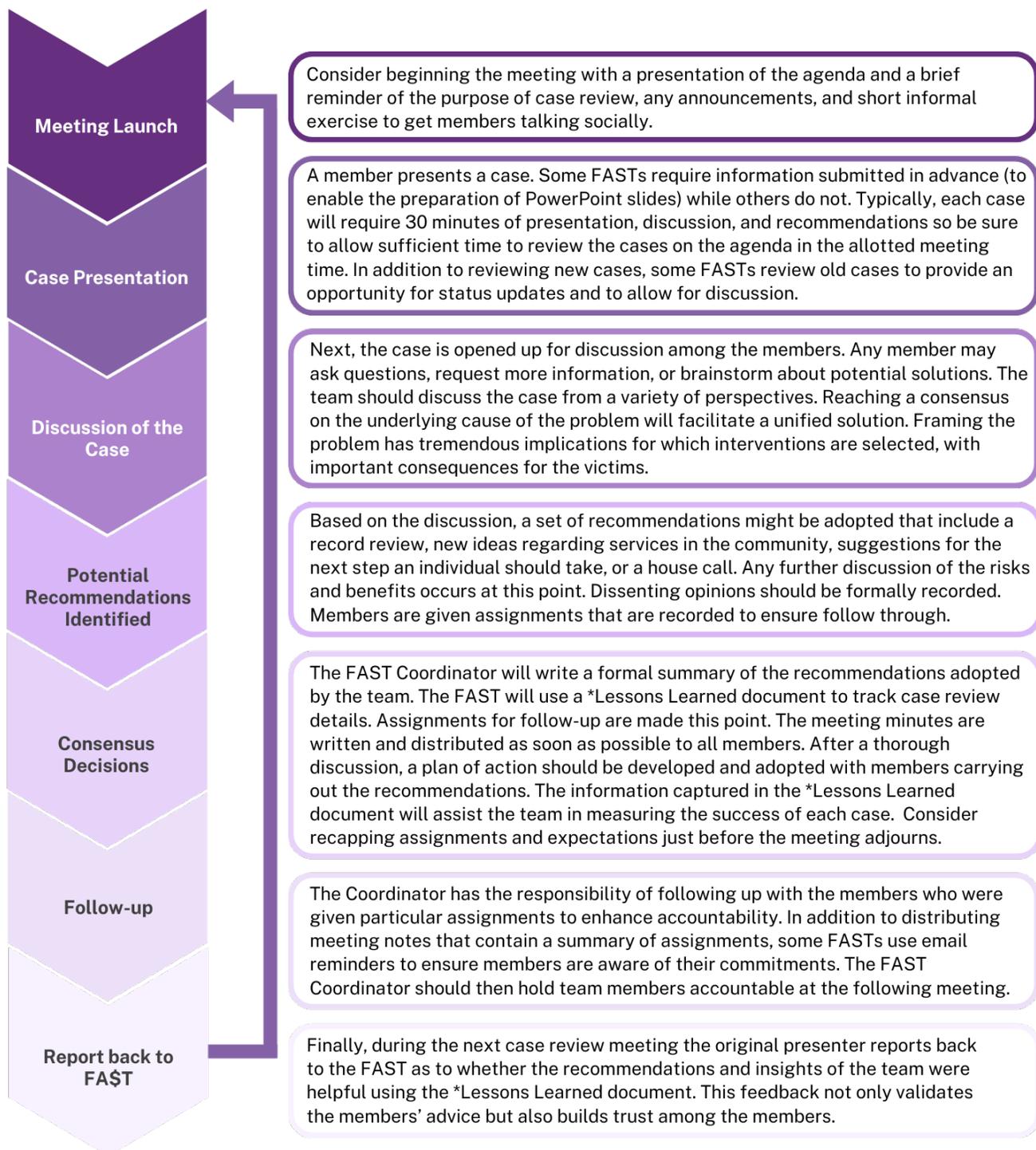
Case Review Process

After your FAST has recruited members and built relationships, you will want to start reviewing cases. Cases will be submitted for review requests. A *Case Referral Form is available for case review requests and a *Case Referral Flow Chart to review the case referral process. A *Financial Exploitation Investigation Checklist can be used to track data collected throughout the investigation and may be helpful to present during the case review.

Your team will need to understand the *Case Review Flow listed below and respect ground rules as stated in the *DOJ Ground Rules listed in the resource section of this guide. Once the case is reviewed, a designated team member will complete the *Lessons Learned document for goals, reflection, and notes on follow-up if applicable. The resource section contains a *Case Scenario with an accompanying completed *Lessons Learned document to demonstrate a Financial Exploitation case, the review process, and what to include in the documentation.

Please see the resource section for a website link to the *State of Wisconsin Laws to assist your team in case reviews. A *Legal Action of Wisconsin Referral Form is available in the resource section of this Toolkit. Please see <https://legalaction.org/> for more information.

FA\$T Case Review Flow Chart



Department of Justice | Elder Abuse Case Review MDT Toolkit

Education Topics

Presentations on current financial exploitation trends among older adults can help members as active participants in the FAST and within their careers. Below are some suggested agencies and organizations to contact for presentation requests and some potential topics to be considered.

Suggested Agencies/Organizations	Suggested Topics
<ul style="list-style-type: none"> • Adult Protective Services (APA) • Better Business Bureau (BBB) • Local Financial Institutions • District Attorney’s Office • Department of Agriculture, Trade, and Consumer Protection (DATCP) • American Association of Retired Persons (AARP) 	<ul style="list-style-type: none"> • (WEAAD) • Current scams and fraud trends • Contract upcharge • Limited capacity • Case prosecution trends

Evaluation Process

To ensure the team continues to run efficiently, it is important to have members complete a *FA\$T Evaluation Form regularly (every 3 months, 6 months, or year). Evaluations should take approximately 2-5 minutes to complete. Evaluations can be conducted via survey platforms such as [Survey Monkey](#), [Doodle](#), or [Qualtrics](#), etc. for quick and anonymous tracking.

RESOURCES

*Available Resources

Resources are identified throughout the Toolkit using an asterisk (*). Below is a comprehensive list of the resources found at the end of the Toolkit. Resources are available in the folders that came with the zip file on the Wisconsin Elder Justice Coalition website.

Recruiting

- **Recruitment/Event Flyer** – a fillable flyer for teams to use to promote their events and/or to recruit team members.
- **Recruitment Invitation Letter** – a fillable form to personalize for your local team to recruit members.
- **Vermont FAST Video Link** – the video Victoria Lloyd shared and granted permission to use to promote FASTs. This video can be used to educate on FASTs and to recruit members.
<https://www.youtube.com/watch?v=OWGZNSCI8wQ>
- **FA\$T Benefits Flyer** – A Venn diagram that shows the benefits of FASTs for members, victims, and the community.
- **AARP Report: \$28.3 Billion a Year Stolen from Adults 60+ Link** – this article articulates the ‘why’ for a FAST and can be beneficial to recruiting team members.
<https://states.aarp.org/colorado/aarp-report-28-3-billion-a-year-stolen-from-adults-60#:~:text=Older%20Americans%20lose%20an%20estimated,a%20new%20report%20from%20AARP>
- **NCALL Lifting Up Voices Videos Link** – the *Lifting Up the Voices* videos showcase older adult survivors who have encountered intimate partner violence, financial exploitation, scams, sexual assault/abuse, or stalking, with these forms of abuse frequently overlapping. These videos can be used to demonstrate the effects of financial exploitation on older adults and their families and highlight the impact multidisciplinary teams such as FASTs can have.
<https://www.ncall.us/resources/video-library/lifting-up-voices/>

Onboarding/Reference Materials

- **Wisconsin FA\$T Partnership Glossary** – a description of the common Wisconsin FAST members and their roles.
- **Wisconsin FA\$T Partner Map** – This fillable document will educate members about the FAST’s system by analyzing the roles of each agency, how they work with their clients and other agencies, gaps in service, and areas for increased collaboration and networking.
- **Wisconsin FA\$T Partner Map Example (Waukesha)** – This example was drafted using Waukesha’s mapping brainstorm documentation to demonstrate what to include in your team’s map.
- **Account Ownership Types & Glossary** – a description of types of checking and savings accounts and a glossary of financial terms (Vermont document used as a reference).

- **CFPB Financial Caregiver Glossary** – This resource contains options for informal and formal financial caregivers. Definitions for each type of financial caregiver are listed and ‘next steps’ website addresses are provided at the end of the document.
- **Department of Justice (DOJ) Glossary of terms** – This glossary contains common terms and definitions used in multidisciplinary teams such as FASTs.
- **Memorandum of Understanding (MOU)** – a fillable document to personalize for your local FAST members to complete.

Meetings

- **Zoom Tutorial** – an informational/troubleshooting guide for Zoom to assist with virtual or hybrid meetings.
- **Microsoft Teams Tutorial** – an information/troubleshooting guide for Teams to assist with virtual or hybrid meetings.
- **FA\$T Agenda Template** – A Fillable template to personalize for your local FAST meetings.
- **Waukesha FA\$T Agenda Example** – This is an agenda from the Waukesha FAST to demonstrate what is included in a FAST meeting and its agenda.
- **Confidentiality form** – a fillable form for FAST guests to complete to protect the client’s confidentiality.
- **DOJ Coordinator Checklist** – provides suggestions for coordinator tasks before, during, and after meetings.
- **NCALL Lifting Up Voices Videos Link** – the *Lifting Up the Voices* videos showcase older adult survivors who have encountered intimate partner violence, financial exploitation, scams, sexual assault/abuse, or stalking, with these forms of abuse frequently overlapping. These videos highlight the effects of abuse on older adults and their families, and they offer insights into effective interventions. Each video is accompanied by a discussion guide tailored for a diverse audience, facilitating individual reflection or group discussion in FAST meetings.
<https://www.ncall.us/resources/video-library/lifting-up-voices/>

Case Review

- **Financial Exploitation Investigation Checklist** – This fillable document identifies all possible areas of financial exploitation. Adult Protective Services (APS) will document the investigation process and could present this form for a FAST case review if applicable.
- **Case Referral Flow Chart** – a visual of the FAST case **referral** process
- **Case Referral Form** – a fillable form to be completed for case review requests.
- **Case Review Flow Chart** – A visual of the FAST case **review** process with a clarifying paragraph for each step.
- **DOJ Ground Rules During Case Review** – This is a list of ground rules for the FAST to consider for implementation.
- **Lessons Learned Log** – a fillable form for case details and reflection.
- **Leon Case Scenario & Lessons Learned** – an example of a financial exploitation case and a completed ‘Lessons Learned’ document to accompany the scenario.

- **Legal Act!on of Wisconsin Referral Form** – used to request services. Legal Act!on of Wisconsin helps clients who have been victims of domestic violence, crime, elder abuse, sexual assault, and human trafficking protect their rights and secure support and protection. See Legal Act!on of Wisconsin website for more information. The main intake line is 855-947-7529 and is staffed 9 a.m. – 4 p.m. (CST) M-F <https://legalaction.org/>
- **Website link to State of Wisconsin Laws** – a link to the state laws housed on the Elder Abuse Guide for Law Enforcement (EAGLE) website. This site has Charges, Statutes, State Mandated Reporting, and Consumer Protection Statute categories. <https://eagle.usc.edu/state-specific-laws/wi/>

General Information

- **AARP website link** – This website link has a Chapter 11 introduction, AARP Personal and Legal Rights Principles, Elder Abuse, Estate Planning and Probate, Adult Guardianship, Civil Rights, Exorbitant Fines and Fees, Private Enforcement of Legal Rights, Legal Services, Fraud and Criminal Justice, and Intergenerational Cooperation links. <https://policybook.aarp.org/policy-book/personal-and-legal-rights>
- **CFPB Choosing a Trusted Contact** – this resource explains what a trusted contact is, how it works, and the benefits. This resource can be used to educate members on options available to protect older adults.
- **CFPB Cross-Training Topics** – ideas for cross-training during your FAST meetings.
- **CFPB Managing Someone Else’s Money website link** – contains links to guides for Power of Attorney (POA), Court-appointed guardians, trustees, and government fiduciaries. <https://www.consumerfinance.gov/consumer-tools/managing-someone-elses-money/>
- **CFPB Recovering from Elder Financial Exploitation: A framework for policy and research website link** – This report offers an initial detailed account of how older adults regain stability after experiencing financial exploitation. It outlines a recovery framework based on insights gathered from one-on-one interviews conducted by the CFPB with older adults, caregivers, and professionals, along with a review of relevant literature from various fields. <https://www.consumerfinance.gov/data-research/research-reports/recovering-from-elder-financial-exploitation-framework-for-policy-and-research/>
- **DOJ Ethical and Legal Considerations** – This document includes information on confidentiality, MOU’s, and cultural competency for your team to consider as the protocol is established.
- **FA\$T Evaluation Form** – a list of questions that can be used to assess your FAST regularly as determined by your team. The form can be downloaded and used in paper format, or the questions can be imported into an online survey such as Qualtrics, Survey Monkey, or Doodle Polls.
- **FA\$T Event Flyer** – This fillable template can be used for marketing any event.
- **Financial Exploitation Investigation** – This flow chart demonstrates the Adult Protective Services Financial Exploitation investigation process.
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- **World Elder Abuse Awareness Scam Tips** – This resource contains a list of red flags to look out for as well as resources to contact for financial exploitation assistance. The document is fillable so local ADRCs can add their information.

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