

The role of the adviser in preventing elder abuse

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15 steps in 15 minutes



1. Booking an appointment

Instructions will need to be taken from the client and not a 'delegate'.

The meeting can be arranged by a 'delegate', but the meeting must take place with the client.



2. Sole participation

The client should be interviewed alone.

Sometimes a support person may be present but that person will need to be someone with no personal interest in the outcome of the service being considered.

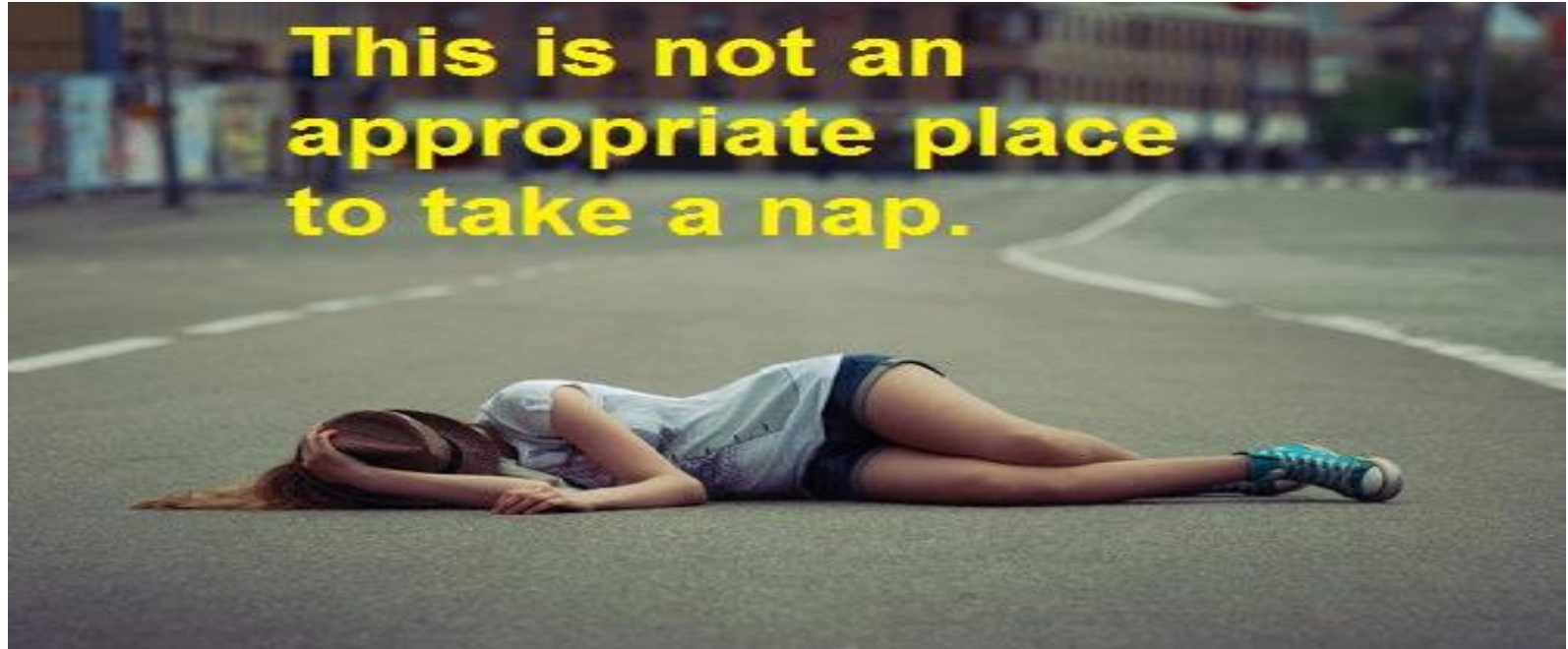
Any person who may have an interest should be excluded.

3. Allow sufficient time

Ensure sufficient time is allocated to enable the transaction to be properly explained and the client's understanding carefully assessed.



4. An appropriate place



4. Pick an appropriate place to give advice

The meeting should occur at a place where it is appropriate to discuss the relevant issues. This shouldn't be a café, supermarket, newsagent, pharmacy or any other place which doesn't offer a quiet and confidential space.

It shouldn't be a social occasion.

If occasion demands, it may be a hospital.



5. Quiet surroundings

The environment in which the meeting is held must allow the client to concentrate on the advice given.

This may mean that young children, mobile phones and other distractions are removed.



6. Be an Independent adviser

The client should choose their own adviser.

Otherwise the client may not be treated as having received independent advice.



7. Get the language right

Any conversation should occur in a language which both the adviser and the client fully understands.

If this isn't possible, an independent and qualified interpreter should translate the conversation.

A person who has an interest in the advice should never be the interpreter.

8. Ascertain the intended outcome

The client should state the outcome which the client wants to achieve, and the reason for obtaining the service.

This could be as simple as “I want to make a will because I’ve never made one”.



9. Explain the transaction

The adviser should explain the effect of the transaction or service involved and highlight the positive and negative features.

There will usually be advice about alternatives which could be available to the client.

10. Probe for understanding

An adviser should discuss the relevant issues in a way which allows them to form an opinion about the client's understanding of the particular transaction or service.



11. Test volition

An adviser should 'test' the client to ensure the transaction is being undertaken voluntarily.



12. Ask open questions

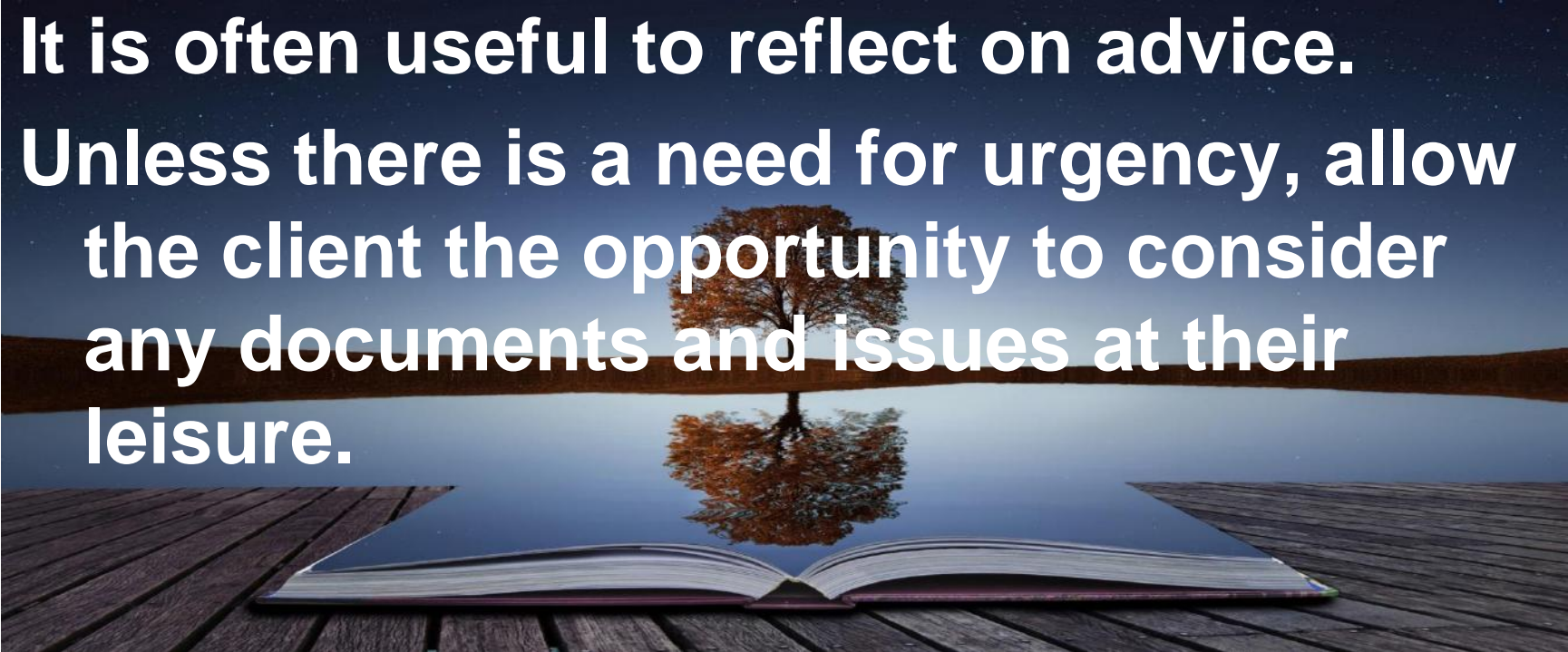
Open questions require the client to provide information, rather than give 'yes' or 'no' answers.

This approach can be challenging for clients. It can be viewed as prying into personal or confidential issues.

But it is an important part of the adviser's role.

13. Allow time to reflect

It is often useful to reflect on advice. Unless there is a need for urgency, allow the client the opportunity to consider any documents and issues at their leisure.

A composite image featuring a wooden dock in the foreground with an open book lying flat on it. In the middle ground, a calm body of water reflects a single tree with autumn-colored leaves. The background is a dark, starry night sky.

14. Make and keep good records

An adviser should take detailed notes of questions asked, answers given and general observations.

This is particularly important where there are circumstances which may cast doubt on the aged person's mental capacity, such as a long standing diagnosis of dementia, recent or current hospitalisation, or significant medical condition.



15. Properly engage experts

If time, circumstance – such as where the adviser has a doubt about the aged person’s mental capacity or volition - and the aged person’s instructions allow

Carefully chose a doctor to provide medical evidence, tell the doctor the relevant legal tests, give the doctor the relevant information and understand the doctor’s limited role.

Questions



The End



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adviser with elder abuse