



Senior Financial Protection Plan Self-Commitment Form

*“The best investment I can make is the time and effort needed to
CHECK the product BEFORE I invest in it!”*

I WILL follow this Financial Protection Plan **BEFORE** I invest in any financial product. I know there are many fraudulent schemes targeting my age group, and I am committed to protect myself and loved ones from the devastation of investment fraud.

1. I WILL ASK THE SALESPERSON TO COMPLETE THE “CHECK BEFORE YOU INVEST” FORM.

“Why would I give my personal information to a stranger who will not provide me the information I need to confirm his/her license and qualifications? I know that legitimate professionals work hard for their qualifications and are happy to discuss them with customers and clients.”

2. I WILL NOT MAKE A DECISION TODAY – NO MATTER WHAT!

“I have worked hard for my money and need it to live on. I will not give it to a stranger until I have taken the time to check the credentials, consider the transaction carefully, and talked it over with people I know and trust. I will not be impressed by their kindness.”

3. I WILL GET COPIES OF ALL DOCUMENTS.

“If it is necessary for me to sign a document, then it is also important that I keep a copy to review carefully.”

4. I WILL NOT BE IMPRESSED BY FANCY TITLES.

“I know that anyone can put impressive-sounding titles or initials after their name. I will not be fooled. I will ask the salesperson what licenses he/she has from government or self-regulated agencies. I will call those agencies to confirm the license or registration.”

5. I WILL BEWARE OF CLAIMS OF “FREE” SERVICES & “GURANTEED” PRODUCTS.

“Professional are in business to make money. I will be suspicious of someone providing me valuable professional services “free of charge.” I will not simply accept claims that the product is “safe, bonded, guaranteed” or insured”. I will check to make sure these claims are real.”

6. I WILL FOLLOW FSAIF FOUR C’s MODEL:

- (1) Call FSAIF First! 1-800-848-3792
- (2) Consider the all my options.
- (3) Compare the product to others.
- (4) Consult with someone I trust.



Bill McCollum Attorney General

Seniors vs Crime

A Special Project of the Florida Attorney General



Senior Financial Protection Plan Self-Commitment Check List

“The best investment I can make is the time and effort needed to
CHECK the product BEFORE I invest in it!”

- I had the salesperson fill out the “Check Before you Invest Form.”
- I did not make a decision at the first meeting.
- I verified the salesperson’s license and qualifications with the appropriate agencies, and confirmed all claims.
FSAIF 1-800-848-3792
- I check the salesperson’s complaint history with the appropriate agencies.
FSAIF 1-800-848-3792
- I discussed the transaction in advance with trusted family and/or friends.
- I received copies of all the documents and reviewed them carefully to make sure the information was consistent with what the salesperson told me.