CFPB resources for financial caregivers

WISER webinar – May 2024
"There are four kinds of people: those who will become caregivers, those who are caregivers, those who were caregivers, and those who will need caregiving themselves."

- Former First Lady Rosalynn Carter
Considering a financial caregiver

- Informal caregivers
- Formal caregivers
- Choosing a caregiver
Managing Someone Else’s Money guides

- Help for financial caregivers handling the finances for a family member or another who is unable to do so
- Guides for four common types of financial caregivers:
  - Agents under a Power of Attorney
  - Guardians and conservators
  - Trustees
  - Social Security and Department of Veterans Affairs (VA) representatives
Planning for diminished capacity and illness

- CFPB and SEC consumer advisory
- Planning ahead may help you stay in control of your finances
- Powers of attorney and trusts are options that can help you plan for the future
Contact us

CFPB – Office for Older Americans
customerfinance.gov/olderamericans

olderamericans@cfpb.gov