

FDT USERS GUIDE:

Send Questions to Dr. Lichtenberg at p.lichtenberg@wayne.edu or 313-664-2633.

Alternate Phrasing for the Financial Decision Tracker (FDT)

- #2. Was this your decision or did someone else influence you?
- #3. What is the main reason for making this decision?
- #4. What is your main financial reason for this decision?
- #5. How will this decision affect your daily finances?
- #7. Does this decision mean there will be less money for others?
- #9. Do you have a will? Does this decision change any previous plans you made in your will?
- #10 Who did you talk with regarding this decision?

CHOICE (Q1)

What financial decision or transaction the client is making or has made.

UNDERSTANDING (Q4, 5, 8)

Knowing the financial goal, impact on finances and knowing who benefits most from decision.

RATIONALE (Q3)

Knowing the main reason for making this decision.

APPRECIATION (Q6, 7, 9)

Knowing the risks involved, and impact of the decision on others.

How to Use the Results from the Lichtenberg Financial Decision Tracker (FDT)

NO CONCERNS LOW RISK

Client does not demonstrate cognitive impairment

1. Use score as a baseline.
2. A release of information form must be signed before sharing the feedback with concerned family about the client's ability to make informed decisions.
3. Allow friends and family the opportunity to complete the FFI if concerns continue.
4. Consider if other services are needed to keep the client independent and living in the community.

SOME CONCERNS MODERATE RISK

Client demonstrates a degree of impaired awareness, integrity or autonomy.

- This could be a temporary issue or the beginnings of a more serious deficit. A complex issue could be more difficult for client to understand.
1. Explore decision in more detail.
 2. Complete FDT at a second visit.
 3. Ask to speak to a trusted family member or friend to complete the Family and Friends Interview (FFI).
 4. A release of information form is needed to share the report with medical providers.

MAJOR CONCERNS HIGH RISK

Client with significant degree of impaired awareness, integrity or autonomy

1. Discuss threats and explore ways to protect the individual. Information on the FDT can be shared with the Judge, Prosecutor, law enforcement and GAL. Do not attach to a petition and request court file as restricted information.
2. Recommend a complete mental health evaluation to look at depression, anxiety, cognitive ability and substance abuse.
3. Recommend client postpone financial transactions.
4. Share publications from the OANE resource page that discuss components of informed decision making (yellow boxes above) and the evidence base for the FDT found at Olderadultnestegg.com.

Note that Q2 and Q10 are to help determine whether the decision/transaction is/was an autonomous choice (person's own desires).