

Protecting a Loved One from Phone-Based Scams

The Three-Layer Safety System

Technology alone can't stop every scam. The strongest protection combines a trusted phone, a trusted person, and trusted financial safeguards.

1

Trusted-Circle Phone

Reduce the number of ways scammers can make contact

- ☐ Turn on **Assistive Access**.
- ☐ Allow only the calls and messages your loved one truly needs.
- ☐ Carefully review every communication app before including it.
- ☐ Remove unnecessary communication apps that open additional "doors" (especially browsers, social media, or messaging).
- ☐ Protect Assistive Access with its own passcode.

Remember: Every communication app is another door into someone's life. Only leave open the doors they truly need.



Need help setting it up? Scan the QR code.



2

Trusted-Person Rule

Build one simple habit

-  **STOP** if someone asks for:
- Money
 - Gift cards
 - Cryptocurrency
 - Banking or account problems
 - Urgency or secrecy
 - Someone claiming to be a family member or government agency

Hang up or end the conversation.



Then call your trusted person using their saved contact, not a phone number provided by the suspicious caller.

3

Trusted Financial Safeguards

Add the financial layer of protection



Ask your bank or credit union about:

- ☐ Adding a trusted contact.
- ☐ Fraud or unusual transaction alerts.
- ☐ Additional verification for large withdrawals or transfers.
- ☐ Elder financial protection services available to customers.

Our Family Plan

Before making an unusual payment, large withdrawal, wire transfer, cryptocurrency purchase, or buying gift cards...

I will first call:

Phone:

Remember

Technology reduces opportunities. People prevent mistakes. Banks reduce financial damage. The goal isn't to take away someone's independence. The goal is to help them keep it safely.



Let Mike Help

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