StoryLens SpotLight Special Episode Podcast

featuring our

Fraud Response Plan Worksheet

One-Sheet Snapshot



Episode 10:

When Fraud Hits Home: Awareness, Protection, and Practical Safeguards

StoryLens Podcast
One-Sheet Snapshot

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In this **SpotLight** Special Episode, John and Kenny step away from their usual format to address something deeply personal. **Both of their mothers were recently targeted in sophisticated financial scams.** These were not minor phishing attempts but coordinated, high-pressure operations designed to create fear, urgency and isolation.



Featuring:
John Christensen
Kenny Conklin

Is This Happening Right Now?

If you or someone you love is currently in a suspicious situation:

1. **Stop immediately.** Hang up the phone. Disconnect from the internet. Close the laptop.
2. **Do not send additional money.**
3. **Call someone you trust.** A child. A trusted advisor. A financial professional. A CPA. An attorney.
4. **Contact your bank immediately.** Request account freezes, wire recalls and fraud reports.
5. **Freeze your credit.** (Experian, Equifax, TransUnion)
6. **File a police report.** Obtain a case number for identity fraud documentation.

There is nothing to be embarrassed about.
Fraud is widespread and highly sophisticated.

How Modern Fraud Actually Works

- Scams often begin with something ordinary: a printer issue, a Microsoft email, a refund.
- They create false urgency: "You owe money," "I will lose my job", "You are in danger."
- **They isolate victims and discourage outside input.**
- They can gain remote access to your computer to steal information, control your computer, access your bank accounts.
- They escalate emotionally before escalating financially.

The Emotional Layer

- Fraud thrives on isolation, urgency, and fear.
- Isolation increases risk.
- Pride, the desire for independence, and confusion can delay a proactive response.
- Both John and Kenny emphasize how proud they are of their mothers for pausing and calling for help.

That pause made all the difference.

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EPISODE 10

Proactive Protection for Families

This episode also challenges families to rethink governance before crisis strikes.

Create Speed Bumps

- Limit the amount of cash held in a primary checking account.
- Separate larger reserves into accounts requiring additional authorization.
- Consider engaging oversight earlier, whether an attorney-in-fact or trustee.
- Add dual controls or positive pay for larger payments or wires.
- Utilize credit cards for all online payments, and never a debit card.

Implement Durable Power of Attorney Earlier

Rather than waiting for incapacity, families may consider earlier governance structures that allow:

- View-only account access.
- Dual wire approvals.
- Co-signature requirements.
- Trusted oversight.

This is not about removing independence.
It is about stewardship and protection.

The Bigger Reality

- Fraud is increasing in sophistication.
- AI and voice replication are accelerating risk.
- Laws and enforcement lag behind innovation.

Remember:

STOP. Verify everything.
PAUSE. Pause before acting.
CONFIRM. Call trusted contacts.

A Final Word

If something feels wrong, it probably is.

Pause.
Call someone.
Let love be stronger than fear.

Spotlight episodes exist to bring clarity when it matters most.
If this conversation helps you, please share it.

Notable Quotes

"When something feels off, step out of the box. Hang up. Unplug. Call someone you trust."
-Kenny Conklin

"These are not random people in a basement. These are coordinated operations."
-John Christensen

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Fraud Response Plan

A Calm Plan for Urgent Moments

If something feels urgent or threatening, pause. **You are not alone**. Begin here. Use this worksheet to make a plan and keep it handy so you are prepared.

STEP 1: Call Family First

Primary Contact: _____

Secondary Contact: _____

Trusted Friend or Neighbor: _____

STEP 2: Contact Your Bank Immediately

Primary Bank Fraud Line: _____

Secondary Bank Fraud Line: _____

Primary Credit Card Fraud Line: _____

Investment Custodian Client Services: _____

STEP 3: Call Your Advisory Team

Financial Advisor: _____

CPA or Tax Advisor: _____

Attorney: _____

Trustee: _____

Reporting Resources

National Elder Fraud Hotline: 1-833-372-8311
FTC Fraud Reporting: ReportFraud.ftc.gov
Identity Theft Recovery: IdentityTheft.gov

Local Police Non-Emergency: _____

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