

What is a Certified Senior Advisor (CSA)®?

A Certified Senior Advisor is a professional who has received a comprehensive education in the health, financial, and social issues facing seniors. CSA candidates must pass a challenging national exam to prove their knowledge of the issues affecting seniors. While most CSAs already have expertise in a professional discipline, it is only after they pass the exam and agree to live up to high ethical and professional standards



that they may use the designation *Certified Senior Advisor*.

What is the Society of Certified Senior Advisors™?

The Society of Certified Senior Advisors is the world's largest membership organization educating and certifying professionals who serve seniors. The Society was founded in 1997 with the input of doctors, attorneys, gerontologists, accountants, financial planners, and other experts who believed there was a need for standardized education for professionals who work with seniors. The Society requires its members to take continuing education emphasizing ethics and volunteer service to seniors.



Certified Senior Advisor Education

Most CSAs have expertise in a professional discipline, such as insurance, financial planning, law, health, home care, or the clergy. The Society's education program complements and adds to that expertise by teaching prospective CSAs about the aging population, its challenges and opportunities, and how CSAs can be of service to seniors. The CSA course of study covers these subjects:



- Principles of aging
- Social aspects of aging
- Trends in aging
- Social Security and taxes
- Financial and estate planning
- Caregiving



- Health, nutrition, and fitness
- Alzheimer's and dementia
- Chronic illness in seniors
- Medicaid planning
- Ethical marketing to seniors
- Business ethics with seniors



- Senior housing and assisted living
- Long-term care
- Grief and loss
- End-of-life planning
- Senior spirituality
- Resources and networking
- Funeral planning



The Society provides its members with updates on leading-edge developments in the field of aging to continually enhance and expand the CSA's skills in working with seniors

CSA Code of Professional Responsibility

To become and remain a CSA in good standing, a CSA must sign the *CSA Code of Professional Responsibility* pledging to adhere to the following principles and standards:



- **Competence.** A CSA must provide services in a competent manner and will maintain the education and skills to continue to do so.
- **Confidentiality.** A CSA will protect the privacy of clients.
- **Professionalism.** A CSA will serve clients, colleagues, and the public with the highest degree of professionalism, and will work to uphold the reputation of the Society of Certified Senior Advisors.
- **Fairness.** A CSA will deliver services in a manner that is fair and reasonable, and will disclose any potential conflicts of interest.
- **Integrity.** A CSA will provide services with honesty and trust, and the client's best interests will always take priority.
- **Diligence.** A CSA will act with timeliness and consistency in fulfilling all professional duties.



Why You Should Work With a Certified Senior Advisor

When you work with a professional who has added the CSA designation to his or her achievements, you know you're working with someone who has invested time and effort in learning about the things that are important to you. CSAs become CSAs because they want to learn more about the health, financial, and social aspects of being 55 or older. They have made specific efforts to earn

your trust. And they have committed to ongoing CSA Continuing Education standards that encourage volunteering for activities that help seniors...and that *require* regular training in dealing with the specialized ethical challenges in working with seniors.

Insist on working with a Certified Senior Advisor — *work with someone who wants to work with you.*

To find a CSA in your area, or to verify that a CSA is a member in good standing, visit our website at www.society-csa.com, call the Society of Certified Senior Advisors at 1-800-653-1785, or e-mail us at society@csa-csa.com.

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Certified Senior Advisor (CSA)®

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Certified Senior Advisor (CSA)®

Providing Current Insightful Information to Seniors



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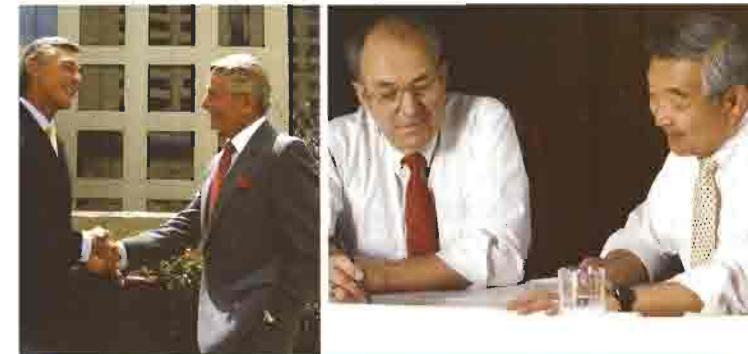
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