

Why should You Work with a Certified Senior Advisor®?

When you work with a professional who has added the CSA designation to his or her credentials, 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 additional education in the specialized needs of 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.csa.us or call 1-800-653-1785, or email us at society@csa.us.

Important: Certified Senior Advisors (CSA) have supplemented their individual professional licenses, credentials and education with knowledge about aging and working with seniors. You should ask what those licenses, credentials and education signify. The CSA designation alone does not imply expertise in financial, health or social matters. For additional information, go to www.csa.us.

Society of Certified Senior Advisors

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Certified Senior Advisor (CSA)®

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of Society of Certified Senior Advisors, Inc.



Certified Senior Advisor (CSA)®

Providing Current Insightful Information to Seniors



You Deserve Professional Senior Advice



Internationally Recognized

What is a Certified Senior Advisor (CSA)®?

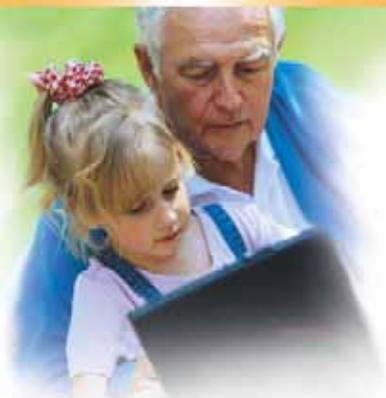
A CSA is a professional who has specialized knowledge about aging and the important health, financial and social issues that affect the majority of seniors. All candidates for the CSA designation must meet eligibility requirements established by the independent SCSA Certification Council, an independent body that oversees the development and administration of the CSA exam and certification program. These requirements include education about senior issues and/or experience working with seniors, passing both a background check and the CSA exam, and signing the CSA

Code of Professional Responsibility. Typically, CSAs already have expertise in a professional discipline; and while many are licensed, it is only after they meet all eligibility requirements that they may use the designation *Certified Senior Advisor*.



What is the Society of Certified Senior Advisors®?

Society of Certified Senior Advisors (SCSA) is the world's largest membership organization educating and certifying professionals who serve seniors. SCSA 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 and a credential for professionals who work with seniors. To remain members of SCSA, CSAs are required to take continuing education that emphasizes ethics and volunteer service to seniors, as well as other requirements.



Certified Senior Advisor Education

A CSA's knowledge about the aging population—its challenges and opportunities, and how CSAs can be of service to seniors—complements and adds to a CSA's existing specialty. CSAs are usually professionals in areas such as insurance, financial planning, real estate, law, health, home care, or the clergy. By successfully passing the challenging designation exam, CSAs demonstrate their specialized knowledge in five key areas:

- ◆ Social aspects of aging
- ◆ Health aspects of aging: physical and mental
- ◆ Financial and legal aspects of aging
- ◆ Government assistance for seniors
- ◆ Ethical communication with seniors

Many topics are represented within these key areas, including:

- ◆ Principles of aging
- ◆ Physical and cognitive aging
- ◆ Health, nutrition and fitness
- ◆ Senior spirituality
- ◆ Grief and loss
- ◆ Chronic illness in seniors
- ◆ Alzheimer's and dementia
- ◆ Senior housing choices
- ◆ Caregiving and home and community-based services
- ◆ Financial and estate planning
- ◆ End-of-life and funeral planning
- ◆ Medicare, Medicaid and Social Security
- ◆ Long-term care
- ◆ Ethical business practices and marketing to seniors
- ◆ Resources available to help seniors

SCSA provides its members with updates on leading-edge developments in the field of aging to continually enhance and expand the CSA's knowledge about 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 standards:

- ◆ **Competence.** CSAs are obliged to keep their professional training, skills and knowledge current and comprehensive to competently provide professional services to clients.
- ◆ **Honesty.** CSAs shall not lie, cheat or steal and must accurately communicate to clients their professional licenses, credentials and other business qualifications; and must be clear in their communications with clients.
- ◆ **Trustworthiness.** CSAs must act in a trustworthy manner by promptly and courteously addressing client questions and concerns and performing their services in the client's best interests.
- ◆ **Fairness.** CSAs shall conduct their professional activities fairly and impartially and must disclose all potential or perceived conflicts of interest that may arise. CSAs must rigorously safeguard client, potential client and business associate information.
- ◆ **Professionalism.** CSAs must serve with the highest degree of professionalism, use due diligence and act in good faith in all matters, upholding both the standards of the CSA designation and any other licenses or credentials they hold.

