

# After Credentials, Two Realtors Show How To Delve Deeper To Serve Seniors

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In residential real estate, specializing in the seniors market can bring success and satisfaction.

For many of the 1.3 million Realtors, residential agents experience success through specialization. Consider what the senior-serving market as a line of business could mean for your definition of success.

The growth of the U.S. population age 65 and older surpasses the growth of both the population under 65 and the total population. That's according to the [Census Bureau](#) in an [October report](#). "The United States will experience further expansion of the older population for many decades to come," the report suggests, "fueled by the baby boom cohort that began turning 65 years old in 2011."

The [National Association of Realtors](#) (NAR) imparts knowledge about, and empathy for, the mature community age 50 and above. NAR's designation of [Seniors Real Estate Specialist](#) (SRES) is for members who've completed their SRES course and passed the exam. "By earning the SRES designation," the NAR literature states, "Realtors are prepared to approach mature clients with the best options and information for them to make life-changing decisions."

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The expansive 50-plus age demographic holds the largest and wealthiest segment of homeowners. With pre-retirees and more, the demographic is replete with ranges of generational life events for older adults, which underscores the opportunity for proficient agents to specialize services for resource-conscious seniors.

After the initial education and designation, though, what can Seniors Real Estate Specialists do to build their capabilities to serve the seniors market?

I asked Realtors Hilary Walker, SRES, Seniors Division Director with [American Realty Professionals of GA](#), who's also a real estate instructor of the SRES designation; and Brandy Heath, SRES, Affiliate Broker with [Crye-Leike](#), who's also a registered nurse, to share practical ways that agents can self-propel their knowledge and abilities for senior-focused service.

**Tom Pfister:** After earning the SRES designation, what did you immerse yourself in that contributed to your proficiency to satisfy older persons' real estate needs?

**Hilary Walker:** It is important to continue networking and meeting with senior providers such as Elder Law Attorneys, Assisted Living site representatives, other vendors such as Move Managers and Estate



Hilary Walker, SRES, Seniors Division Director  
COURTESY OF HILARY WALKER

Sale Coordinators. Building relationships allows me to hear from others the kind of issues they find common, and for me to share my clients' concerns that might be of interest to them.

Working directly with older adult clients has been the greatest experience—to learn each person's wants and needs by listening and being empathic to their journey. The more people I consult with brings me closer to the conclusion that I need to use the skills of a social worker to best serve my client(s). Every situation is different and needs a unique plan of action, which includes being able to provide resources for them, as and when a need arises.

**Brandy Heath:** After earning the SRES designation, I spent time visiting senior citizen centers, speaking with professionals in senior living communities, and with others who provide services to seniors in the

community. This gave me an opportunity to ask questions and discover a variety of needs that many seniors have pertaining to real estate.



Brandy Heath, SRES, Affiliate Broker, RN  
COURTESY OF BRANDY HEATH

I also recommend speaking with seniors or adult children who have older parents they help take care of. Volunteering is another good way to work with seniors to understand their real estate needs. You establish relationships, build trust, and people open up about their concerns, and oftentimes it is about their current living situation and worries about moving.

**Pfister:** Hilary, from the technical side, how does learning a local jurisdiction's property tax abatement program for seniors assist in your conversations with clients about financial impacts?

**Walker:** The local property tax abatement is important to know, but it can be a small part of the financial impacts for some clients. Essentially, it is one of a

number of variables that can make or break the purchase of a home for later life, and having some idea of any benefits or implications is paramount. The selling of a client's home may also raise a number of questions that are important for SRESs to advise on before getting an offer on the client's home. For example; can property gains, from house equity, impact Medicare and or VA benefits?

**Pfister:** Brandy, can you stress for agents the hindrance and harm, even inadvertently, that elderspeak can have on clients?

**Heath:** Many times, people do not realize when they are using elderspeak. Or, they may not realize why they shouldn't use elderspeak. So we need to make a conscious effort to address seniors like the adults they are. Talking to senior clients like they are children, or talking louder just because they are seniors, are all forms of elderspeak that agents need to be aware of.

If you want to establish beneficial relationships and effectively work with elders, you must treat them like adults, speak to them like educated people, look at them and explain things to them, not just their adult children (when present). If you find yourself using elderspeak, make it a priority to change the way you speak and approach seniors. Otherwise, you will most likely hinder any relationship you have or could have with senior clients. Show the same respect, and speak to your senior clients just as you would your younger clients, and you will establish mutual respect and beneficial relationships.

**Pfister:** For both of you, can you talk about your approach to successfully delivering service when there is regular input from adult children of clients, as well as input from the professional relationships other service providers have with your mature clients?

**Walker:** My approach is to get adult children into the conversation as early as possible. Invite them to join the consultation meeting, if your client agrees. If they don't agree, ask if you can set up a conference call. While my duty is to my client, it is important for me have an understanding of how their child's input will impact the selling or buying of a home. My goal is to build a relationship with all parties enough for them to be confident with who their parent is working with, even if that means providing an overview of the service I provide, clarifying the lines of communication and obligations and making the adult child aware of how best to reach me.

The same for professional service providers. Depending on the provider, I would ask permission from my client to contact them and introduce myself, so that they too know who to contact should a need arise. There may be a possibility of overlapping information, such as an Elder Law Attorney needing to know when we have a binding contract with the property so they can prepare a Trust document in time for closing day. The key is to connect and help your client through the transition with as little stress as possible.

**Heath:** When specializing in helping senior clients, I frequently deal with not only the client, but their adult children and other providers as well. My approach is to use patience, frequent communication, and working as a team to come up with a plan that best serves the client's needs. I listen to each involved party and gather as much information as possible so I can better understand each person's view on what is best for my client. I find myself helping everyone involved see other perspectives. Ultimately, it is the client's decision, but I provide different perspectives and help discuss possible solutions so there is a win-win situation.

I always ask the client if there are any family members or friends that should be included in conversations. With permission from the client, I have frequent conversations with adult children and service providers. This helps with open communication and really understanding perspectives and needs. I feel a team approach works well if the client approves. This way, we can better understand concerns that one person may not have thought of. Then, we can move forward with what decision makes the most sense for the senior client. Sometimes, it means staying at home with additional services, other times it may mean selling the client's home and moving to Independent Living, Assisted Living, or a smaller, more maintainable home closer to family. The goal is for the senior client to be happy with the decision and make the right decision for their particular situation.

**Pfister:** For additional insights on seniors real estate, visit Hilary's site [AtlantaSeniorsRealEstate.com](http://AtlantaSeniorsRealEstate.com), and Brandy's site [SeniorHomeSeller.com](http://SeniorHomeSeller.com).



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