



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.

CSA Is Accredited by NCCA

The National Commission for Certifying Agencies (NCCA) was created to help ensure the health, welfare and safety of the public through the accreditation of a variety of certification programs/ organizations that assess professional competence.



720 S. Colorado Blvd, Suite 750 North, Denver, CO 80246

Phone: 800-653-1785 ■ Fax: 303-757-7677 ■ www.csa.us

Why Should You Work With a Certified Senior Advisor?

When you work with a professional who has earned the Certified Senior Advisor (CSA)[®] credential, you are working with an individual who demonstrates practical skills and knowledge, a commitment to lifelong learning and ethical standards, and a passion for working with seniors. www.csa.us/FindaCSA

Insist on working with a Certified Senior Advisor; work with someone who is committed to you.



Neel "Eve" Connolly, PLLC
Certified Senior Advisor, CSA[®]
eve8835@gmail.com
www.retirementinprescott.com
(928)713-0756

"Extending a Hand of Compassion"

Important: Certified Senior Advisors (CSA) have supplemented their individual professional licenses, credentials and education with knowledge about aging and working with seniors. The CSA designation alone does not imply expertise in financial, health or social matters. Find out more at www.csa.us



YOU DESERVE PROFESSIONAL SENIOR ADVICE





What Is a Certified Senior Advisor (CSA)®?

A CSA is a professional who has knowledge about aging and important health, social and financial issues that affect the majority of seniors. Typically, CSAs already have expertise in a professional discipline – home care, senior housing, law, real estate, health care, clergy, insurance services, financial planning – and have chosen to supplement that existing professional knowledge with the CSA education. While many are licensed in their professional discipline, it is only after they meet all eligibility requirements that they may use the designation of *Certified Senior Advisor*.

All candidates for the CSA designation must meet eligibility requirements established by the SCSA Certification Council, an independent body that oversees the development and administration of the CSA exam and designation program. These requirements include:

- education about senior issues and/or experience working with seniors
- pass a criminal background check
- pass the CSA designation exam
- pass the *CSA Code of Professional Responsibility* exam

To continue using the CSA credential, CSAs are required to fulfill requirements for continuing education, disclose any new legal or regulatory issues and reaffirm their pledge to uphold the *CSA Code of Professional Responsibility*.

Certified Senior Advisor Education

Among the hundreds of education programs and credentials available today, the Certified Senior Advisor course is in a category by itself because it educates professionals about seniors – how aging works, how it changes seniors' lives, how it affects their decisions and how professionals can apply what they know about growing older to help people age successfully..

The CSA curriculum was developed with experts in aging from across many industries and covers 22 different topics that comprehensively explore the key issues that most impact the lives of seniors today. These 22 topics are divided into 5 key areas:

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

SCSA also provides its members with ongoing education 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 principles and 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 communication 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 interest.
- **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 the standards of the CSA designation and any other licenses or credentials they hold.

