

What is a Certified Senior Advisor (CSA)®?

A Certified Senior Advisor is a professional who has completed a rigorous course of instruction in the concerns facing seniors. This course is taught by a nationally recognized panel of experts in social work, law, medicine, gerontology, geriatrics and financial planning. Upon completion of the course, candidates for the designation must pass a comprehensive exam to demonstrate their knowledge of the issues and their commitment to meeting the needs of their senior clients. Upon successfully passing the CSA examination, a CSA automatically becomes a member of the Society of Certified Senior Advisors.



What is the Society of Certified Senior Advisors™?

The Society was founded in 1996 with the input of doctors, attorneys, gerontologists, accountants, financial planners and other experts who realized a need for standardized education for professionals who work with seniors. Based on a report from AARP, 1.5 million professionals work full time with seniors, but only 8,000 have gerontology degrees. Not only must Society members meet a certain level of education in issues pertinent to seniors, they must adhere to a strong code of professional responsibility.



Certified Senior Advisor Education

Each Certified Senior Advisor must demonstrate an understanding of the following topics:



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



- Health, nutrition & fitness
- Alzheimer's & dementia
- Chronic illnesses in seniors
- Tax planning



- Medicaid planning
- Ethical marketing to seniors
- Business ethics with seniors
- Senior housing & assisted living



- Long-term care
- Grief & loss
- Advance directives
- Senior spirituality
- Resources & networking
- Funeral planning

After receiving their CSA designation, CSAs are provided monthly education on the medical, social and financial issues that are important to older adults.

CSA Professional Responsibility Code

To remain in good standing, a CSA must adhere to a Code of Professional Responsibility encompassing the following canons:



- **Competence.** A CSA will 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 enhance 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 best interests of the client will always take priority.
- **Diligence.** A CSA will act with timeliness and consistency in the fulfillment of all professional duties.

