

Chapter Guide

Working with Senior Clients



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Pricing (Members and Non-members)

1. Members: \$25 minimum (\$25 remitted back to National)
2. Non-Members: \$40 minimum (\$40 remitted back to National)

Chapters will be responsible for refunds related to seminar registrants.

Revenue Sharing

1. Chapters are required to remit \$25 for members and \$40 for non-members for seminar attendees.
2. Full accounting and allocation must occur within 30 business days following the seminar.

Important: If multiple chapters wish to hold the event together, revenue sharing will be left to the discretion of the chapters involved, as documented in a joint agreement. A joint agreement template can be found at: <http://www.advocis.ca/secure/chapters/pdf/program-guidelines-R.pdf>

Promoting the Program

The main vehicles for chapters to promote this program will be email, “word-of-mouth” marketing, and the display and distribution of collateral materials.

The target audiences for this course are:

- CFP® and QAFP™ professionals;
- CLU® designated advisors and CLU® designation program candidates;
- PFA™ designated advisors and program candidates; and,
- Experienced financial advisors, members or non-members of Advocis.

Learning Objective

The objective of the Working with Senior Clients Program is to inspire Financial Advisors and Planners to understand how to differentiate themselves as the go-to professional with their senior clients, as well as their families, friends and in their community. This program will help financial advisors and planners develop the practices and processes that will protect and empower their clients and protect their practice. They will learn about their responsibilities and how to recognize issues such as elder abuse and cognitive impairment.

Participant Eligibility

Working with Senior Clients is for all Financial Advisors and Planners regardless of experience level.

What Participants Need

Participants will need:

- Blank paper or notepad

Facilitator Resources

Upon submission of the online **Working with Senior Clients Registration Form** available on Chapter Central, facilitator will receive access to the following resources:

Resource	Details	Format
Chapter Guide	The Chapter Guide outlines available facilitator resources and recommendations on how to run your event.	PDF
Video	The video to play in the event.	MP4

Event Format

The following is how to run the event.

Suggestion on How to Run your Event

For in-person events, provide each participant with blank paper for note taking.

For virtual events, advise participants to have paper or a computer on hand to take notes.

CE Accreditation

The Working with Senior Clients program has been approved for 2 CE credits (including 1 Ethics and 1 Professional Responsibility credit with FP Canada).

Questions

If you have questions, concerns, or comments regarding the facilitator resources, please contact Maja Golich, Education Coordinator via email at mgolich@advocis.ca.