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# Certified Senior Advisors: What They Do and Why They Matter

A Public Service Presentation provided by the  
Society of Certified Senior Advisors® (SCSA)

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# Topic Overview

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- What is a CSA?
- CSA Credential Overview
- Who CSAs Are
- Why CSAs Matter
- Common Collaboration Partners
- What I do as a CSA



# What is a Certified Senior Advisor (CSA)<sup>®</sup>

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- Professional designation focused on adults **50+**
- Applies multidisciplinary knowledge of **aging, health, finance, and social needs**
- Helps identify **tailored solutions** to improve quality of life
- Supports decision-making in **healthcare, retirement, long-term care, and family dynamics**
- Represents professionals who are **knowledgeable, ethical, and committed**
- Assures the public of **high standards, continuing education, and professional integrity**



# CSA Certification Overview

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## CSA Certification Requirements & Standards:

- Adherence to the **CSA Code of Professional Responsibility**
- Completion of the **CSA Ethics Module (the CSAs Role, Rules & Responsibilities)**
- **Pass the CSA certification exam and background check**
- **Ongoing commitment** to serving older adults
- **Continuing education** required to maintain certification
- Program built on **rigorous research** and industry expertise
- **Accredited by ANAB and NCCA**
- Certification and recertification ensure **ethical standards and professional competence**



# Who CSAs Are

Area	What CSAs Do
<b>Healthcare &amp; Wellness</b>	<ul style="list-style-type: none"> <li>• Explain Medicare, Medigap, long-term care insurance, and care-coordination options</li> <li>• Help families understand in-home care, assisted living, memory care</li> <li>• Coordinate with healthcare providers and community resources</li> </ul>
<b>Housing &amp; Transitions</b>	<ul style="list-style-type: none"> <li>• Help evaluate whether staying home, downsizing, or moving to senior living is appropriate</li> <li>• Recommend home safety modifications</li> <li>• If appropriately licensed, assist with reverse mortgages or real estate transactions; otherwise, refer to qualified professionals</li> </ul>
<b>Financial Guidance</b>	<ul style="list-style-type: none"> <li>• Help organize budgets, cash-flow awareness, and financial preparedness</li> <li>• Identify red flags such as scams, fraud, or exploitation</li> <li>• CSAs only provide investment advice or sell financial products if they hold the proper professional licenses; otherwise, they refer to licensed fiduciary advisors</li> </ul>
<b>Legal &amp; Estate Planning</b>	<ul style="list-style-type: none"> <li>• Recognize when a will, power of attorney, or trust may be needed</li> <li>• Refer to qualified elder law attorneys</li> <li>• Educate clients on how to avoid predatory or misleading seminars</li> </ul>
<b>Family Dynamics</b>	<ul style="list-style-type: none"> <li>• Facilitate discussions about driving, caregiving responsibilities, or end-of-life preferences</li> <li>• Help reduce conflict with empathy and neutral guidance</li> </ul>
<b>Social &amp; Emotional Support</b>	<ul style="list-style-type: none"> <li>• Reduce isolation by connecting seniors to community programs, volunteering, and social opportunities</li> <li>• Recognize early signs of depression or cognitive decline and refer to appropriate professionals</li> </ul>

**Note:** The CSA designation is a supplementary certification demonstrating that an individual has specialized knowledge in matters affecting older adults. At the same time, CSAs are expected to practice within the boundaries of their professional experience and to refer clients to appropriately qualified specialists when issues arise that fall outside their expertise.



# What CSAs Do

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## Real Word Examples:

**Helping a Widow Downsize** - A CSA meets with a 78-year-old widow overwhelmed by her 4-bedroom home. They:

- Research local senior apartments
- Coordinate a trusted mover and estate sale
- Ensure her medications transfer smoothly
- Introduce her to a new community's social club

**Spotting Financial Abuse** - A son notices his dad sending \$500/month to a “sweepstakes.” The CSA:

- Educates the senior on common scams
- Refers him to Adult Protective Services
- Helps set up a revocable trust with a successor trustee

**Navigating a Dementia Diagnosis** - After a parent's Alzheimer's diagnosis, the CSA:

- Explains memory care vs. in-home care costs
- Refers to a geriatric care manager
- Hosts a family meeting to align everyone on next steps



# Why CSAs Matter

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## Cross-Disciplinary Knowledge (Health, Social, Financial):

- **Health:** Aging-related care, Medicare navigation, long-term care options; assess needs and connect clients to suitable services
- **Social:** Family dynamics, isolation prevention, community resources; support living preferences and emotional well-being
- **Financial:** Retirement and estate planning, long-term care costs, budgeting; align financial resources with care needs
- **Result:** An integrated approach that enhances professional expertise and improves outcomes for older adults

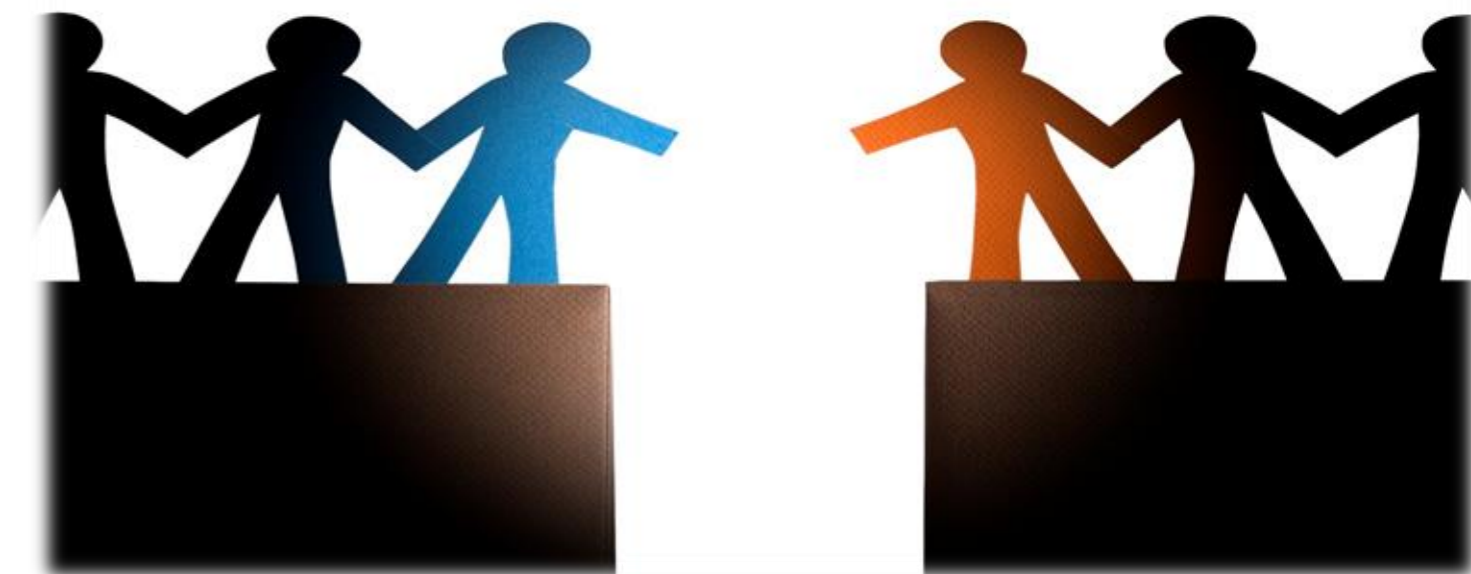


# Why CSAs Matter

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## Helping Bridge the Gap Between Professionals and Older Adults:

- **Ethical Standards:** Follow CSA Code of Professional Responsibility to build trust and prioritize client needs
- **Referrals & Coordination:** Connect clients to vetted professionals (attorneys, care managers, financial planners) and simplify access to multidisciplinary care
- **Communication & Empathy:** Understand senior values and transitions; guide sensitive discussions on aging and end-of-life planning
- **Interprofessional Collaboration:** Integrate healthcare, home modifications, technology, and community support to prevent issues and promote holistic care
- **Outcome:** Empower older adults through coordinated, client-centered support



# Collaboration with Other CSAs and Professionals

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## Typical Ways CSAs Collaborate:

- **Leaders Networks:** Participate networking groups designed to connect CSAs across disciplines and industries within distinct regions. This is where collaboration happens, referrals are made, and thought leadership is shared.
- **Client-Centered Team Meetings:** Organize or join meetings with attorneys, CPAs, financial advisors, and care managers to align recommendations
- **Warm Handoffs & Shared Documentation:** Obtain client releases to share medical, financial, and legal info securely
- **Continuing Education Together:** Co-present or attend workshops to strengthen professional relationships
- **Co-Marketing & Co-Branding:** Host joint seminars on senior care, legal, and financial topics



# Common Collaboration Partners

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- **Elder Law Attorneys**
- **Financial Advisors**
- **Geriatric Care Managers / Aging Life Care Professionals**
- **Medicare Insurance Advisors**
- **Long-Term Care Insurance Professionals**
- **CPAs / Tax Professionals**
- **Daily Money Managers**
- **Home Care Agencies & Senior Placement Professionals**
- **Physicians, Geriatricians, Pharmacists**
- **Veteran Service Officers**
- **Guardians**
- **Real Estate Professionals**



# What I do as a CSA

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Here is where an individual will input info about what they do as a CSA and how being a CSA has helped them.