



What Is a Certified Senior Advisor (CSA)?

A CSA is a professional who has knowledge about aging and the important health, financial and social 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 and 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 *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 we can apply what we know about growing older to help people age successfully.

The CSA course was developed with experts in aging from across many industries and covers 23 different topics that explore the health, social and financial issues that most impact the lives of seniors today. These 23 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 40 page *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.

