Jennifer Moir
BA (Hons), CHS, EPC, CRTS, DFP

Founder, Age Well Solutions
www.agewellsolutions.ca

AGEWELL SOLUTIONS
Partner with a professional

Know Your (Senior) Client™

How age changes senior client's interpretation of success, and the advice you offer.

New chapter. New questions.

Prepare your practice to thrive with aging clients and families.

To succeed with aging and senior clients today requires an understanding of the shifting goals and concerns that come with advancing age, changing measures of "success", and connecting it all with financial readiness and your advice.

As a trusted advisor, clients will look to you to help them navigate the gaps between their perceived and actual readiness, and to guide them in laying the groundwork for financial and later life success as they define it, and which are often intimately connected. This session prepares you to do so.

The KY(S)C™ session will enhance your ability to:

- understand common age-related goals and concerns that influence client choices and decision-making
- uncover "vulnerability gaps" in a client's perceived and actual financial readiness to reach later life goals and ease common concerns
- align your advice and service to improve aging client's financial and personal preparedness and "resilience"
- initiate conversations about financial and personal readiness and set the course for more planning activity.

About Jennifer Moir:
Founder of Age Well Solutions (2015) Jennifer is a committee member of the Seniors Expert Advisory Council (Ontario Securities Committee), an Elder Planning Counselor, Certified Health Specialist, Relocation and Transition Specialist and founder of the Dementia-Friendly Professional™ (DFP) training program for financial service professionals.

With over 25 years of working with aging adults and the professionals who serve them, Jennifer and her team are uniquely positioned to provide financial services professionals with the knowledge and insight needed to offer exceptional service and advice to some of their most valued and long-term clients. From balancing privacy and advocacy in the face of dementia, ensuring compliance with new professional standards linked to vulnerable investors, or delivering whole-person, whole-family advice to aging adults, Age Well Solutions offers vital guidance that helps advisors protect their clients and ensure their practice thrives.

Jennifer lives in Ottawa, has two children, and enjoys a variety of sporting activity including cycling and golf.
