



## Jennifer Moir

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Founder, Age Well Solutions  
[www.agewellsolutions.ca](http://www.agewellsolutions.ca)



*Partner with a professional*

# The Complete Older Adult Profile™

Connecting whole-person wellbeing with financial longevity



## **New chapter. New questions.**

**Prepare your practice to thrive with aging clients and families.**

An aging person's health is a major factor in determining not only personal longevity and quality of life, but financial longevity too. Mastering the COAP™ - an interactive discovery tool – gives advisors the ability to engage, educate, and empower aging clients to not just improve their health, but preserve their wealth! It can also be a key starting point for more detailed planning discussions. Now that's powerful.

### **The COAP session will prepare you to:**

- better understand the link between whole-person wellbeing and financial longevity;
- introduce and guide clients through the COAP tool with confidence and excitement;
- evaluate COAP as both a service and marketing tool for your practice;
- consider various implementation options and select the best method for your practice.

### **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.

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**Build Your Knowledge Series**

**Session 2**