Dementia-Friendly Professional™

The Introductory program

New chapter. New questions. New responsibilities.

One in four persons over the age of 80 will experience some degree of cognitive change impacting their financial management capacity and decision-making abilities. As a trusted advisor, balancing advocacy and privacy is a commitment to client service excellence and sound business practice.

The **Dementia Friendly Professional (DFP™) introductory program** is your starting point to meeting not only new regulatory requirements, but a growing expectation among aging clients to advocate and prolong their participation in financial matters, and protect their long-term security. The DFP™ helps you turn uncertainty, into opportunity for both your clients, and your practice.

VIRTUAL EVENT - Two ½ day sessions!

Must attend both days

Tuesday, June 13th *and*
Wednesday, June 14th 2023
1:00 – 4:00PM EST

Register by May 31st, midnight for EARLY BIRD pricing!
Advocis Members **$ 179.00**
Non-members **$ 199.00**

After June 1st…
Advocis Members $ 199.00
Non-members $ 219.00

All pricing includes taxes; registration fees extra

7.0 CE credits, 2.0 ethics *The Institute, MFDA*
Eligible CE credits Ont, Sask, Man., AB and BC

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

What Advisors will learn:

- Deeper understanding of the link between the aging brain, normal and abnormal change, effect of dementia on financial management capacity and how to address related risks
- To identify behavioural indicators, and the communication and response strategies you can use to work safely and effectively with your client as they progress along the dementia spectrum
- To fulfill regulatory expectations concerning "vulnerable investors" and related best practices & procedures
- The costs of living with dementia, and recommended approaches for advance planning and discussions
- About best practice guidelines and precedence so you can confidently balance advocacy and privacy, including client engagement techniques, escalation protocols and documentation
- How to create a Dementia Friendly Practice™: framework and resources to support you
- Learn about next steps in becoming a Dementia-Friendly Professional™

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 and enjoys a variety of sporting and outdoor activity, travel, and music.

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