

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. Protect your clients. Protect your practice.

Fall 2023 – three opportunities to choose from
 This is a professional development webinar event. Participants must attend both days

**Tuesday, Oct 17th and
 Wednesday, Oct 18th**
 1:00 – 4:30PM EST

**Tuesday, Nov 21st and
 Wednesday, Nov 22nd**
 1:00 – 4:30PM EST

**Tuesday, Dec 19th and
 Wednesday, Dec 20th**
 1:00 – 4:30PM EST

Advocis Members \$ 199.00
Non-members \$ 219.00
Taxes and registration fees extra

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

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™