

# Age-Ready™ Your Practice

## Fall 2023 Modules

3.0 CE's, incl. 1.0 Ethics

The Institute, MFDA approved



### Module 1 - KY(S)C (*Know Your (Senior) Client*)

As a trusted advisor, senior clients look to you to help them navigate the gaps between their perceived and actual readiness as they age, and to guide them in laying the groundwork for both financial and later life success.

#### In this session you will learn:

- the common age-related goals and concerns that influence client decision-making.
- the “5 questions, 5 minutes” system that will help you proactively uncover and document “vulnerability gaps” and identify immediate service opportunities.
- how to quickly align your advice, deliver service, and improve aging client “resilience”.

### Module 2 – High Impact, Later Life Transitions

Aging clients are likely to experience one or several common later life transitions and events that will test their ability to live independently and put pressure on their relationships and finances. Understanding these later life challenges positions you to provide key planning advice in advance and deliver immediate, high impact relief in the moment.

#### In this session you will learn:

- about the most common later life events and the associated financial, personal, family impact
- early indicators or red flags of potentially disruptive later life events and how to respond.
- how to deliver *immediate, high impact* service with minimal effort and expense.
- how to turn concerns about later life events into a growth opportunity for your practice.

### Module 3 – Serve, Retain, Grow

There is no question that aging clients will redefine your practice, for better, or for worse. There is urgency in understanding the risk and opportunity within you practice and pivoting your service offerings, so you remain indispensable in the eyes of existing clients and families, while attracting new prospects.

#### In this session you will learn:

- four things you can do to affirm your relevance and better connect with aging clients, prospects.
- to complete a practice profile so you can offer targeted, relevant service to clients, prospects.
- considerations when pivoting your service offering to ensure success and manageability.