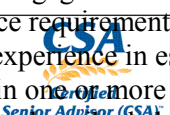


Certified Senior Advisor (CSA)® is not listed below because it represents a combined or holistic approach to serving seniors; it does not represent a certain expertise in a specific profession. The CSA designation signifies that a professional has knowledge about the health, social and financial issues of aging, and it supplements a professional's existing expertise. **CSA Disclosure Statement:** Certified Senior Advisors (CSAs) have supplemented their individual professional licenses, credentials and education with knowledge about aging and working with seniors. The CSA designation alone does not imply expertise in financial, health or social matters. For details, visit www.csa.us; 1-800-653-1785.

The **CSA designation** is offered by the **Society of Certified Senior Advisors®**. CSA is **accredited** by the **National Commission for Certifying Agencies (NCCA)** and governed by the independent SCSA Certification Council. The independent CSA Board of Standards enforces the CSA Code of Professional Responsibility.

CSA Requirements: complete the CSA application; pass a background check; pass the CSA Code of Professional Responsibility online module and sign the CSA Code; fulfill education/experience requirements (see options below), pass the CSA exam; after being designated, fulfill 18 CSA CE credits every 3 years, which includes 3 ethics credits. Education/experience options: 1) complete the CSA course or its training equivalent and have one year of paid work experience working with seniors or 50 hours of volunteering with seniors in the last three years; 2) two years of paid work experience working with seniors or 100 hours of volunteer experience with seniors within the last three years; 3) a certificate or degree in a field related to working with seniors from an accredited college or university.

Designation	Description	Requirements	Governing Body and Contact Information
AAMS (Accredited Asset Management Specialist)	Awarded by the College for Financial Planning to those who have met requirements in a course of study on asset management.	Students must complete the distance learning program; pass the final examination; and comply with the Code of Ethics. Must complete 16 hours of CE every two years.	College for Financial Planning® Administrative Offices 8000 E. Maplewood Ave. Suite 200 Greenwood Village, CO 80111 800-237-9990 http://www.cffp.edu
ABA Accredited Business Accountant	NCCA accredited. A credential awarded by the Accreditation Council for Accountancy & Taxation to individuals who have demonstrated technical proficiency in financial accounting, compilation services, accounting, taxation, business law and ethics.	The Comprehensive Examination for Accreditation in Accountancy is a one-day, seven-hour exam that tests the technical proficiency of candidates in financial accounting, financial reporting, financial statement preparation, taxation, business consulting services, business law and ethics. There is a three-year experience requirement to earn and use the credential.	The Accreditation Council for Accountancy and Taxation® (ACAT) 1010 N. Fairfax Street, Alexandria, VA 22314-1574, 888.289.7763 x 1343, http://www.acatcredentials.org
AEP Accredited Estate Planner	A credential awarded by the National Association of Estate Planners and Councils to professionals who meet stringent experience and education qualifications including two graduate level courses administered by The American College.	Licensed Attorney or to practice as a Certified Public Accountant (CPA), or be currently designated as a Chartered Life Underwriter (CLU), Chartered Financial Consultant (ChFC), Certified Financial Planner (CFP®), or Certified Trust & Financial Advisor (CTFA). Must be presently engaged in "estate planning activities" Experience requirement: A minimum of five years of experience in estate planning is required in one or more of the professional disciplines described above. To be exempt from the education requirements described below, an  Senior Advisor (GSA)	National Association of Estate Planners & Councils 1120 Chester Avenue, Suite 470 Cleveland, OH 44114, Phone: (866) 226-2224, Fax: (216) 696-2582 , http://www.naepc.org

For more information about the CSA designation, please contact us at:



Your Name, Title

Company Information

Certified Senior Advisor(CSA)®

Address

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