



Survey for Designation Holders

We have heard from a number of advisors that they are concerned with the specific challenges facing seniors and their families.

CSI is developing a program that will provide information and support tools to assist financial advisors in dealing with the unique challenges of their senior clients. Before we begin this work, we want to hear from you. As a designation holder your voice on this issue is important to us. Please take a few minutes to answer the short survey below.

Thank you for your contribution to this important initiative.

From your experience, which of the following issues, are of particular concern to seniors?

	Not at all concerning	Somewhat concerning	Very concerning	Don't know
Senior abuse (i.e. fraud; coercion)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Outliving their wealth	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Declining cognitive capacity	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Diminishing lifestyle	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Lack of a financial plan	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
No power of attorney	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
No will or estate plan	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Inadequate planning for declining health	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Dependent children	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Challenging family dynamics	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Retiring on a low income	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Bereavement (spouse, friends, family)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Loneliness, boredom	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Life on their own	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Feelings of irrelevance, inadequacy	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Contemplating death	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Other issue(s) (please specify):

With the aim of better serving your aging clients, on what issues would you like to have additional support and guidance?

	Not at all important	Somewhat important	Very important	Don't know
Recognizing signs of elder abuse (coercion, fraud)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Recognizing signs of cognitive decline and other age-related psychological changes	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Escalation polices following recognition of elder abuse and/or client behavioral changes	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Dealing with erratic behavior	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Health care options in Canada	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Common emotional issues (i.e. loss of independence, loss of lifestyle, death of spouse etc.) and how to talk with aging clients about them	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
How to minimize an aging client's risk of outliving their wealth (sustainable and maximum withdrawal rates)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Assisting clients with estate planning advice, particularly on issues like business and personal property (i.e. cottage etc.) succession	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
How to deal with a client's challenging family dynamics	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Recognizing signs of identity theft	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Investment strategies for seniors	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Identifying a trusted contact person	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Employment opportunities for seniors	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Access to a database of support in the community	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Information on housing options for client and family	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Access to information on Govt support programs	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

We would like to help you and other designation holders access free sources of information, material and tools to assist in dealing with seniors and their families.

Please share where you go now for support tools that you can use with your senior clients? (check all that apply)

- Resources on my company intranet
- Information from Seniors resource sites such as CARP, Senior Living, AARP
- Tools that were developed or purchased privately and are not appropriate for sharing
- Other, please specify and provide URLs if possible:

Please share what type of tools you would find most helpful to share with your senior clients and their families. (Select all that apply)

- Printed material
- Online videos
- In-person seminar material (Power Point)
- Online webinars
- Conference calls
- Other, please specify: _____

If CSI were to provide free presentation templates and seminar promotion support, would you be interested in hosting a seminar in your community aimed at reaching seniors and their family members and providing guidance on how to deal with financial issues?

- I am very interested in participating
- I want to know more
- I am not sure if my employer would sanction my participation
- I am not at all interested

Please select from the following activities that you would like to participate in for this initiative?

- I would like to attend a free CSI webinar on the results of this survey
- I would like to be one of the presenters of CSI webinar publicizing the results of this survey
- I would like to host a webinar in my community for seniors in collaboration with CSI
- I would like to collaborate with CSI and act as a volunteer for different activities relating to this initiative

We recognize that you may have relevant experience dealing with seniors. Do you have any suggestions on how we might approach our support to advisors and their clients?

Do you currently advise clients directly and who among them are seniors?

- I advise clients directly; less than 25% are of senior age
- I advise clients directly; 25% to 50% are of senior age
- I advise clients directly; 51% to 75% are of senior age
- I advise clients directly; 75% or more are of senior age
- I do not advise clients directly

What percent of your senior clients would you estimate are women (single, widowed)?

- Less than 25%
- 25% to 50%
- 51% to 75%
- More than 75%

What percent of your senior clients would you estimate are in each of the following family annual income categories: Annual income is defined as the total family annual corporate and government pension income, income from RRSPs and non-registered investments and other sources such as annuities and alimony. (all amounts must total 100%)

below \$49,999	_____
\$50,000 to \$150,000	_____
above \$150,000	_____
Total	_____

We think the breadth of the challenges facing seniors is broad and that there is lots of scope for contributions from many parties. Please mention names of industry groups, associations focused on seniors, charities and/or influencers that are working on challenges facing seniors.