



FOR IMMEDIATE RELEASE

FPA Partners to Help Members, Financial Planners Support Elder Planning Needs of Clients and Their Families

DENVER (February 23, 2023) – As the American populace grows older, financial planners will need to address the increasing financial impact felt by older Americans and their families. To support financial planners in developing their elder planning competencies, the [Financial Planning Association® \(FPA®\)](#) is pleased to announce a new partnership with noted authorities in elder planning to make the [Elder Planning Specialist Program](#) available to FPA members.

Created by Annalee Kruger and Bob Mauterstock, CFP®, co-founders of [Plan4Life, LLC](#), the Elder Planning Specialist Program is a first-of-its-kind, 10-week online program that positions financial planners to address the complex issues they face in working with aging clientele. Delivered in a cohort format, the first cohort will begin Monday, Mar. 27.

“Aging not only impacts those who are getting older, but also has an impact on those families and caregivers who want to ensure their loved ones are properly taken care of,” says 2023 FPA President James Lee, CFP®, CRPC®, AIF®. “Financial planners are in a unique position to provide empathetic support and guidance, but that means they need to understand the many issues older Americans face. Annalee and Bob are well-known experts in this space who have developed a program we are now delighted to offer through FPA for our members. A program we believe will best position our members and their clients for addressing these challenges with care and diligence.”

The Elder Planning Specialist Program is designed to prepare serious financial planners to meet the needs of their older clients. The program includes a real-life case study format, weekly lectures by nationally recognized experts, tools and resources, and a marketing plan to differentiate those completing the program. Guest experts will cover critical areas of elder planning, including legal planning, long-term care planning, end-of-life planning, and running family meetings.

The original program was brought online with Salem State University, which was spearheaded by Bob Powell, CFP®, who joined the Plan4Life, LLC, team three years ago.

“How powerful to be a financial planner who asks the right questions, identifies clients’ needs outside of portfolio management, and differentiates themselves from the thousands of other professionals in meeting the holistic needs of families they work with,” says Annalee Kruger, co-founder of Plan4Life, LLC. “The Elder Planning Specialist Program was designed to position today’s financial planner to support elderly clients and their caregivers in making sound decisions. We are honored to work with FPA to make this life-changing program more widely available to financial planners across the country.”

While the program is self-paced, participants must complete all requirements for each session within one week. Each week of the program, powered by FPA's online learning platform, is focused on a specific area of elder planning that, when combined, positions participating financial planners for success. Participating financial planners will need to allocate up to five hours each week to the program. The weekly schedule includes the following:

- Week 1: Understanding the Aging Process and the Caregiver's Role
- Week 2: Diversity and Aging and Insights into Retirees 85 and Older
- Week 3: Legal Issues of Aging
- Week 4: Increasing Approaches to Planning for Extended or Long-term Care
- Week 5: Social Security and Medicare Planning
- Week 6: Diminished Capacity, Elder Abuse, End-of-Life Plans
- Week 7: Structuring and Conducting the Family Meeting / Ethical Will / Legacy Letter
- Week 8: Developing a Marketing Plan
- Weeks 9: Building an Elder Planning Team
- Week 10: Creating and Presenting Your Aging Plan

To support participating financial planners in getting the most out of the program, each week includes a live discussion with that week's expert where a deeper exploration of the topic can occur. Weekly quizzes and a final exam will measure individual progress.

The program qualifies for 10 CFP® CE credits and is available to FPA members for \$1,195 and nonmembers for \$1,495. Participants receive a certificate of completion showing their specialized elder planning training.

"Financial planners must meet the needs of their older clients or they will be losing access to the fastest growing, most profitable segment of the market. We are confident that the Elder Planning Specialist Program will help financial planners meet that need," adds Bob Mauterstock, co-founder of Plan4Life, LLC.

Registration for the first cohort is now available at the [FPA website](#). A recording of an [informational session](#) about the program is available on-demand.

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About the Financial Planning Association

The Financial Planning Association® (FPA®) is the leading membership organization and trade association for CERTIFIED FINANCIAL PLANNER™ professionals and those engaged in the financial planning process. FPA is the CFP® professional's partner in planning by helping them realize their vision of professional fulfillment through practice support, learning, advocacy, and networking. Learn more about FPA at financialplanningassociation.org and on Twitter at twitter.com/fpassociation.

About Plan4Life, LLC

Plan4Life, LLC, was started because Annalee Kruger and Bob Mauterstock recognized many financial planners do not inquire about or address the very real financial threats of retirement and aging, family caregivers leaving the workforce to "caregive" and seniors who are failing at home due to lack of proper support. Plan4Life, LLC, teaches forward-thinking financial planners how to ask the right questions, feel more comfortable talking about aging, differentiate themselves as an Elder Planning Specialist, and market themselves and build a business of true caring connection with their clients.

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