Training Course on Financial Gerontology: Planning for the Older Adult

Professional Development Training Course Outline

Category	Pension and Retirement	**Duration**	10 Days
Base Fee	$3,000 USD	**Delivery Mode**	Online / On-site Hybrid

Course Introduction

Training Course on Financial Gerontology: Planning for the Older Adult is designed to equip financial professionals with the knowledge and skills necessary to effectively address the unique financial needs of older adults. As the population ages, understanding the complexities of financial planning for seniors becomes increasingly important. This course focuses on the principles of financial gerontology, enabling participants to provide comprehensive planning solutions that enhance the financial security and well-being of older clients. Participants will explore key topics such as retirement income planning, healthcare costs, estate planning, and the psychological aspects of financial decision-making in later life. The curriculum integrates theoretical concepts with practical applications, featuring case studies and interactive exercises that allow attendees to engage with real-world scenarios. By the end of the training, participants will be well-equipped to implement effective financial strategies tailored to the needs of older adults.

Programme Curriculum

Training Course on Financial Gerontology: Planning for the Older Adult

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Course Objectives

1. Understand the fundamentals of financial gerontology and its significance.
2. Analyze the financial needs and challenges faced by older adults.
3. Evaluate retirement income sources and strategies for seniors.
4. Explore healthcare cost considerations for older adults.
5. Discuss estate planning and wealth transfer strategies.
6. Develop skills in assessing and managing financial risks in later life.
7. Foster effective communication with older clients and their families.
8. Create actionable financial plans tailored to older adults' needs.
9. Stay informed about emerging trends in financial gerontology.
10. Measure the effectiveness of financial strategies for older clients.
11. Identify tools and technologies for managing financial gerontology.
12. Prepare clients for potential financial challenges in later life.
13. Understand the psychological aspects of financial decision-making in older adults.

Target Audience

1. Financial advisors and planners
2. Retirement specialists
3. Wealth management professionals
4. Compliance officers
5. Actuaries and actuarial analysts
6. Gerontologists and healthcare professionals
7. Graduate students in finance or gerontology
8. Policy makers in financial management for older adults

Course Duration: 10 Days

Course Modules

Module 1: Introduction to Financial Gerontology

- Overview of financial gerontology concepts and their importance.
- Key terminology related to financial planning for older adults.
- Historical context and trends in aging and financial planning.
- Case studies illustrating the impact of effective financial planning for seniors.

Module 2: Financial Needs and Challenges of Older Adults

- Identifying the unique financial needs of older adults.
- Analyzing common challenges faced by seniors in managing finances.
- Understanding the role of life expectancy and health status in financial planning.
- Real-world examples of financial challenges in later life.
- Tools for assessing clients' financial situations.

Module 3: Retirement Income Sources for Seniors

- Overview of various retirement income sources (Social Security, pensions, savings).
- Evaluating the impact of different income streams on financial security.
- Discussing strategies for optimizing retirement income.
- Real-life examples of income planning for older adults.
- Tools for calculating retirement income needs.

Module 4: Healthcare Costs for Older Adults

- Understanding the rising costs of healthcare in retirement.
- Evaluating Medicare and Medicaid options for seniors.
- Discussing the importance of long-term care planning.
- Real-world examples of healthcare cost planning.
- Tools for estimating healthcare expenses in retirement.

Module 5: Estate Planning and Wealth Transfer

- Overview of estate planning concepts relevant to older adults.
- Techniques for integrating estate planning into financial strategies.
- Understanding wills, trusts, and powers of attorney.
- Real-life examples of effective estate planning for seniors.
- Tools for creating and documenting estate plans.

Module 6: Managing Financial Risks in Later Life

- Identifying risks associated with aging and financial management.
- Techniques for mitigating risks through insurance and diversification.
- Understanding the role of emergency funds and liquidity.
- Real-world examples of risk management strategies for older adults.
- Tools for assessing financial risk exposure.

Module 7: Communicating with Older Clients and Families

- Importance of effective communication in financial gerontology.
- Techniques for engaging older clients in financial discussions.
- Developing educational materials tailored to seniors.
- Best practices for addressing client concerns and questions.
- Real-world examples of successful client communication.

Module 8: Creating Actionable Financial Plans for Older Adults

- Steps for developing comprehensive financial plans for seniors.
- Engaging clients in the planning process to ensure their preferences are met.
- Techniques for integrating financial gerontology insights into planning.
- Real-world examples of actionable financial plans.
- Tools for documenting and tracking financial plans.

Module 9: Trends in Financial Gerontology

- Overview of emerging trends affecting financial planning for older adults.
- Discussing innovations in financial products and services for seniors.

- Evaluating changes in legislation impacting older adults' finances.
- Real-life examples of adapting to industry trends.
- Tools for staying updated on developments in financial gerontology.

Module 10: Measuring the Effectiveness of Financial Strategies

- Techniques for evaluating the success of financial plans for older adults.
- Understanding key performance indicators for financial gerontology.
- Real-world examples of assessments and outcomes.
- Tools for monitoring clients' financial progress over time.

Module 11: Tools and Technologies for Financial Gerontology

- Overview of tools and resources available for managing finances for older adults.
- Evaluating software and applications for tracking financial health.
- Discussing the role of technology in enhancing financial planning.
- Real-life examples of effective technology use in financial gerontology.
- Tools for selecting the right resources for client needs.

Module 12: Psychological Aspects of Financial Decision-Making

- Understanding the psychological factors influencing financial decisions in older adults.
- Discussing cognitive decline and its impact on financial literacy.
- Techniques for addressing emotional factors in financial planning.
- Real-world examples of psychological considerations in financial gerontology.
- Tools for supporting clients through decision-making processes.

Training Methodology

- **Interactive Workshops:** Facilitated discussions, group exercises, and problem-solving activities.
- **Case Studies:** Real-world examples to illustrate successful community-based surveillance practices.
- **Role-Playing and Simulations:** Practice engaging communities in surveillance activities.
- **Expert Presentations:** Insights from experienced public health professionals and community leaders.
- **Group Projects:** Collaborative development of community surveillance plans.
- **Action Planning:** Development of personalized action plans for implementing community-based surveillance.
- **Digital Tools and Resources:** Utilization of online platforms for collaboration and learning.
- **Peer-to-Peer Learning:** Sharing experiences and insights on community engagement.
- **Post-Training Support:** Access to online forums, mentorship, and continued learning resources.

Register as a group from 3 participants for a Discount

Send us an email: info@fineskilltrainingcenter.org or call +254769199797

Certification

Upon successful completion of this training, participants will be issued with a globally recognized certificate.

Tailor-Made Course

We also offer tailor-made courses based on your needs.

Key Notes

- Participants must be conversant in English.
- Upon completion of training, participants will receive an Authorized Training Certificate.
- The course duration is flexible and can be modified to fit any number of days.
- Course fee includes facilitation, training materials, 2 coffee breaks, buffet lunch, and a Certificate upon successful completion.
- One-year post-training support, consultation, and coaching provided after the course.
- Payment should be made at least a week before the training commencement to Fineskill Training Center account, as indicated in the invoice, to enable better preparation.

Upcoming Scheduled Sessions

Start Date	End Date	Location	Price
21 Sep 2026	02 Oct 2026	Online	$2,000
21 Sep 2026	02 Oct 2026	Physical	$3,000
21 Sep 2026	02 Oct 2026	Physical	$0
21 Sep 2026	02 Oct 2026	Physical	$0
21 Sep 2026	02 Oct 2026	Physical	$0
21 Sep 2026	02 Oct 2026	Physical	$0
21 Sep 2026	02 Oct 2026	Physical	$0
21 Sep 2026	02 Oct 2026	Physical	$0

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