

Helping Financial Professionals Achieve Their Goals

Introduction to Dementia: Spotting Red Flags for Clients at Risk for Exploitation

With the adoption of FINRA rule 2165 and the amendment of FINRA rule 4512, it's more important than ever that financial planners understand what makes an older client vulnerable to exploitation. Alzheimer's disease and other dementias, even in the earliest stages, frequently render older clients vulnerable. But can you spot the signs? This program will help you understand the difference between normal aging and dementia symptoms so you can better protect your older clients.

Benefits include:

- Boost in credibility with older clients and their families
- Reduced liability in servicing older and vulnerable clients
- Increased confidence handling situations with vulnerable and older clients

Complicated Clients And Colleagues: How to Cope and Collaborate with Provocative People

Approximately 15% of all people have a personality disorder (DSM-5). These frequently undiagnosed conditions impair a person's ability to reason and relate effectively with others. Working with someone who is overly dramatic, has difficulty respecting boundaries or needs excessive attention, is not only exhausting but prevents financial professionals from reaching their goals. This program will unlock the secrets to understanding and collaborating with clients and colleagues who have provocative personalities.

Benefits include:

- Increased sales
- Reduced burnout and better self-care for staff
- Save time and energy working with challenging people

Navigating Communication with Different Generations: Reducing Drama and Conflict

Today's workplace is comprised of colleagues, vendors and customers from up to five different adult generations. Much like gender, socioeconomics and race, our generational affiliation strongly influences how we think, communicate and lead. In order for Traditionalists and Baby Boomers to collaborate more effectively with Generations X, Y and Z, everyone has to tweak their instinctive communication approach. This program will help improve morale and productivity, while reducing misunderstandings and resentment in workplace communication.

Benefits include:

- Increased productivity and profitability
- Communication with clients of different generations
- Reduced drama, misunderstandings and conflict in the workplace

As Featured in:



Jennifer FitzPatrick, MSW, LCSW-C, CSP
Speaker • Author

With over 20 years experience in both business and healthcare, Jennifer holds a Master of Social Work (MSW) and is one of less than 800 Certified Speaking Professionals (CSP) worldwide. The author of *Cruising Through Caregiving: Reducing The Stress of Caring For Your Loved One*, she appears frequently in the national media. She has taught Business, Entrepreneurship, and Health Sciences at the college level and currently is an adjunct instructor at Johns Hopkins University's Certificate on Aging program.

Her programs help financial organizations and professionals:

- Increase sales with clients and potential clients of different generations
- Boost business and decrease liability by protecting older and vulnerable investors
- Create and maintain professional boundaries with clients
- Collaborate better with colleagues and clients who have challenging personalities



Ready to discuss how Jennifer can help your audience?

Contact Marcia at **888-797-6700** to schedule a presentation today!
Marcia@BlueFeatherManagement.com

Testimonials

"Jennifer is by far the most compelling speaker I have used and/or heard to date."

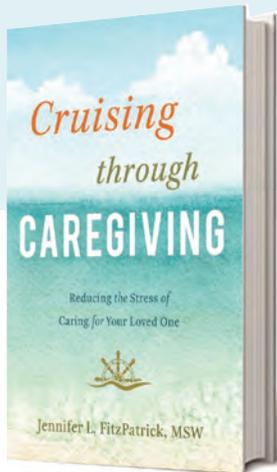
Alison Ruchaevsky, Marketing Director, Green Hill, Inc.

"Jennifer helped our members better understand characteristics of different generations and how that impacts communication. This program helped us identify areas where our firms could improve/enhance service to clients and family caregivers of different generations."

Julia Price, JD, Conference Chair, Life Care Law Firms Planning Association

"You are an excellent and passionate presenter and did a great job. You are a pro! We could have gone on for hours..."

Shari Manculich, Senior Manager, One PepsiCo



Book Reviews

This is a useful resource from someone with vast experience, both as a gerontologist and a caregiver.

Kimberly Williams-Paisley, Actor and New York Times best-selling author of *Where The Light Gets In*

I strongly recommend this book not only to families dealing with the stress of caregiving, but also to the professionals who seek to help them.

Marsha Goodman, CELA, President, Life Care Planning Law Firms Association

Partial Client List

Alert Pharmacy Services
Alzheimer's Association
American Case Management Association
Anne Arundel County
Beacon Institute
Brightview Senior Living
City of Alexandria

Easton Police Department
Erickson Living
Georgetown University Hospital
HCR Manor Care
Jefferson University Hospitals
Life Care Planning Law Firms Association
Methodist West Houston Hospital

National Association of Social Workers
Society For Social Work Leadership
In Healthcare
State of Delaware
The Arbor Company
University of Maryland
Women's Food Service Forum



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