

# **Support System Tools for Collaborative Marketing Platforms**

## ***Understanding the Senior Marketing Tools from the NCPC***

### **About The National Care Planning Council and Collaborative Senior Marketing**

Collaborative Senior Marketing is a marketing concept supported by the National Care Planning Council (NCPC). This marketing concept is designed to assist senior service providers, senior organizations and senior advisers to more easily market themselves to aging seniors and their children or supporters. Collaborative Senior Marketing strategies as outlined in the “*Training Manual for Collaborative Senior Marketing*” have been devised and tested over many years by the founder of the National Care Planning Council – Thomas Day. Tom has used all of the methods and procedures outlined in the training manual to build a successful career serving the needs of aging seniors and their children.

Creation of the National Care Planning Council was a result of Tom’s efforts in serving the needs of the senior community. He realized that those individuals who take care of aging seniors such as their children, siblings, grandchildren or other supporters needed information and support in helping them deal with the challenges of their loved ones’ final years of life. Simply doing his part through his marketing efforts alone was not enough to satisfy his desire to help more people. The National Care Planning Council was a result of Tom’s desire to help the senior community.

The National Care Planning Council was initially launched in 2002 as a website for aging seniors and their families. Because the Internet was fairly new 18 years ago and there was little competition for these services on the Internet, the site became a popular landing page for people seeking help with long term care issues. Over the years, this popularity has continued and approximately 410,000 unique visitors come to the NCPC site every year. In 2006 due to the popularity of the website, it was decided to create a private membership organization out of the NCPC and offer online listing services for financial practitioners, attorneys, home care providers, seniors real estate specialists, reverse mortgage specialists, assisted living and a whole host of similar senior service providers or advisers. Over the years, additional benefits have been added for members such as marketing support options, use of the NCPC logo, use of the ghostwritten articles, care planning books, brochures and booklets and support for veterans benefits.

In 2012, the National Care Planning Council initiated a partnership with the Senior Veterans Service Alliance (SVSA) to utilize the products and services of that nonprofit organization. The NCPC became the sales agent for training materials from the Senior Veterans Service Alliance. This includes a comprehensive handbook on how to apply for veterans benefits as well as training for mandatory CLE required for accredited representatives for veterans claims benefits. The Senior Veterans Service Alliance website is a comprehensive source of information for veterans benefits. The SVSA also offers a service for assistance with applications for veterans’ and survivors’ disability and death benefits through its accredited representatives. The Senior Veterans Service Alliance does not charge any fees for assistance with veterans benefits applications. Beginning on the next page, we discuss our strategies for Collaborative Senior Marketing for individuals and companies who provide senior services.

## Four Highly Effective Marketing Platforms for Collaborative Senior Marketing

***The NCPC supports four highly effective marketing platforms for Collaborative Senior Marketing.*** In order to implement these platforms, the NCPC provides five marketing system tools for a collaborative marketing group. These system tools include: 1) the “*Training Manual for Collaborative Senior Marketing,*” 2) the “*Successful Senior Marketing System,*” 3) NCPC support for “*Local Planning Councils,*” 4) the “*Life Resource Planning System*” and; 5) the “*CLRP Designation.*” ***You can mix-and-match a purchase of any one or all of the five system tools for marketing support in order to implement any one of the the following 4 marketing platforms:***

### **Platform Option #1 – A Local Collaborative Senior Marketing Group**

Our philosophy of organizing a local Collaborative Senior Marketing group is outlined in **Chapter 1** of the training manual. Collaborative marketing to serve aging seniors and their supporters is a natural consequence of the fragmented sources of senior services available in a local area. Senior service providers are naturally drawn to networking to provide their services to the public. Our philosophy focuses on providing free education and advice to family, relatives and other persons who are supporting the needs of aging seniors. Our “***Successful Senior Marketing System***” provides materials to advertise and promote a local Collaborative Senior Marketing Group. **Chapter 2** of the training manual provides instruction on advertising and promoting a Collaborative Marketing Group or a Local Planning Council as outlined next.

### **Platform Option #2 – A Local Planning Council**

A local Planning Council is an organization of senior providers and advisers who wish to formally organize using a unique name and a promotional approach that provides a one-stop shopping service for families needing support for aging seniors. This formal organization also includes putting together a website and providing brochures and other material which promote the Council in the local marketing area. A Planning Council goes beyond a Collaborative Marketing Group by working together as a cohesive alliance of like-minded providers and by conducting educational workshops as a way to promote the services of the alliance. Instructions for organizing a Planning Council are found in **Chapter 3** of the training manual. Material for advertising and promoting a Council is included in the “***Successful Senior Marketing System.***” In addition, ***the National Care Planning Council will support a local Planning Council*** through listing services, consultation, online request forms and website creation and support.

### **Platform Option #3 – Life Resource Planning**

A Collaborative Marketing Group aims to create sales leads for the group. Our philosophy for collaborative marketing focuses on planning and not on direct sales when meeting with persons who represent sales leads. Life Resource Planning was designed to accomplish the planning activities of a Collaborative Marketing Group. The LRP process easily converts leads into sales of products and services. Life Resource Planning is covered in **Chapter 4** of the training manual.

### **Platform Option #4 – A Life Resource Planning Council**

Combining the resources of a local Planning Council with the power of Life Resource Planning results in a synergy we call the “Multiplier Effect.” Individuals and organizations working together as a “Life Resource Planning Council” can enhance sales opportunities tenfold or more over those individuals marketing alone as single practitioners. **Chapters 4 and 5** of the manual provide instructions on understanding, organizing and starting a Life Resource Planning Council.

## **Five Tools for Marketing Support to Implement Collaborative Senior Marketing**

The National Care Planning Council provides 5 system tools for marketing support– introduced on the previous page – to implement Collaborative Senior Marketing. This support includes:

- 1. *The “Training Manual for Collaborative Senior Marketing,”***
- 2. *the “Successful Senior Marketing System,”***
- 3. *support for a “Local Planning Council” from the National Care Planning Council,***
- 4. *the “Life Resource Planning System,” and;***
- 5. *the CLRP™ Designation (Certified in Life Resource Planning).***

***Any person or organization can mix-and-match a request for or purchase of any one or all of the five system tools for marketing support in order to organize and maintain any one of the marketing platforms.***

***Throughout the rest of this overview, we will introduce these five tools and provide a brief description of each of these systems and how they are used. In addition, the 174 page “Training Manual for Collaborative Senior Marketing” goes into great detail into how these five tools are implemented and used.***

## **The “Training Manual for Collaborative Senior Marketing”**

### **Training Manual for Collaborative Senior Marketing**

The “*Training Manual for Collaborative Senior Marketing*” is available as a free resource in PDF format. It is also available in printed form from the NCPC for a small printing, handling and shipping cost. At the National Care Planning Council we are excited to share this valuable 174 page publication with you at no cost to you. The Training Manual is the foundation for our collaborative senior marketing philosophy. In addition to the “*Support System Tools for Collaborative Marketing Platforms,*” addendum at the beginning, the Training Manual it is organized into the following five chapters:

### **Chapter 1 – Collaborative Senior Marketing Will Create New Business**

In Chapter 1 we discuss why there is a need to help aging seniors and their children or other supporters with the challenges of the final years. We also address the dilemma that government and business support for aging seniors is a niche market. As a result, scant advertising or promotion for assistance in this marketing niche results in the public not being able to find specific senior services or products. Our solution is to encourage senior service providers in a geographic area to form an alliance and promote themselves as an expert group who can solve aging problems and provide the needed services and products. This Collaborative Marketing Group provides free advice and education. Resulting consultations from the group with children or other supporters of aging seniors should also be provided free of charge and should focus on planning rather than selling services or products. It is our experience that this Collaborative Senior Marketing solution-based approach – creating planning clients – eventually leads to many more sales of services and products than would be expected from a direct sales approach.

## **Chapter 2 – Effective Promotional Strategies for Collaborative Marketing**

Chapter 2 recommends a variety of promotional and advertising strategies to make children and other supporters of aging seniors aware of the services of a Collaborative Senior Marketing Group. The following lead generating activities are covered in this chapter.

- Existing Business As a Source of Leads
- Direct Marketing As a Source of Leads
- Cooperative Marketing As a Source of Leads
- Influence and Relationship Marketing as a Source of Leads
- Employers and Church Groups as a Source of Leads
- Using the Brochures and the Booklet to Produce Leads
- Using the Internet to Promote Your Marketing Group
- Educational Workshop Marketing to Produce Leads
- Support from the National Care Planning Council

Samples of 18 different advertising pieces mentioned in this chapter are also furnished on the flash drive which comes with the Successful Senior Marketing System (SSM). In addition, the flash drive which comes with the system also includes 191 ghostwritten articles that can be used with marketing strategies discussed in this chapter. This chapter also briefly addresses the use of community educational workshops to provide planning leads for a Collaborative Marketing Group. Workshop marketing is supported by 21 different slide presentations – comprising over 175 total slides – that address aging issues. These presentations are also on the flash drive. In addition, Chapter 2 refers the reader to the educational marketing segment of SSM that is covered in more detail in a 106 page training manual found on the flash drive and entitled *“Training Manual for Successful Marketing through Educational Workshops.”* We discuss the contents of this educational workshop training manual further on.

## **Chapter 3 – How to Organize a Successful Local Planning Council**

A Local Planning Council is a more focused and more formally organized version of a Collaborative Senior Marketing Group. Organizing a Planning Council requires greater effort, thought and commitment than organizing a networking group around Collaborative Senior Marketing. Planning Councils operate more like an informal small business than a networking group only using collaborative marketing. The extra effort to organize and maintain a Planning Council will eventually pay off as this strategy produces more sales leads than an informal Collaborative Marketing Group. Chapter 3 goes into great detail on the initial steps to be taken to make sure that the eventual Council is successful. Finding the right members and setting rules for those members are important issues. The Planning Council will have its own brochures as well as listing services, creation and maintenance of a website and other support from the National Care Planning Council. Local Council members are required to be members of the National Care Planning Council and maintain a listing on the local State Care Planning Council.

## **Chapter 4 – Understanding Life Resource Planning**

The Life Resource Planning System was originally designed to provide a planning process for individuals who became sales leads from the efforts of a Collaborative Senior Marketing Group. It follows the same philosophy as outlined in Chapter 1 of this training manual that the best way to sell products and services is to educate first and then provide a planning solution for individuals who request assistance. Sales naturally follow as a result of this process. We have found over the years that many of the collaborative groups do not want to pursue a planning process. That is a decision that works for them. We have also found over the years that financial services practitioner’s, attorneys, insurance agents and particularly individuals who offer education on veterans benefits use life resource planning by itself and do not use it in the context of a planning group. This chapter describes in detail how the LRP System works.

## **Chapter 5 – How to Organize a Life Resource Planning Council**

By combining the effective marketing capabilities of a Local Planning Council with the Life Resource Planning System, members of the marketing alliance in a Council can achieve a significant increase in business for themselves. Chapter 5 describes the Life Resource Planning Council operating model and how it creates a synergistic sales process that we call the “Multiplier Effect.” Not everyone will want to pursue this model as it is a challenging process to organize a collaborative group around this concept. On the other hand, members of the NCPC have been successful over the years in using variations of this model and in creating significant sales for their local groups. The Life Resource Planning Council model relies not only on using the advertising and promotional strategies found in Chapter 2 of the training manual, but also on putting a great amount of effort into marketing through educational workshops. *“The Training Manual for Successful Marketing through Educational Workshops”* is an important part of the training process in putting together a Life Resource Planning Council and making it work.

## **The “Successful Senior Marketing System”**

### **Description of the Successful Senior Marketing System (SSM)**

The Successful Senior Marketing System from the National Care Planning Council contains most of the marketing and promotional materials to support a Collaborative Senior Marketing Group or support a Local Planning Council. The system is purchased from the NCPC and is shipped with certain printed materials as well as a flash drive that contains most of the promotional and advertising material. The flash drive also contains start up instructions for collaborative groups as well as training, slide presentations and other support for educational workshop marketing.

### **Printed Materials Furnished with the System**

Successful Senior Marketing comes with printed sample materials and a flash drive that contains all of the training and promotional tools in the system in PDF or Microsoft Word format. The following printed samples, also found on the flash drive, are provided to purchasers of the system for more convenient use and for tangible examples.

- *“Training Manual for Collaborative Senior Marketing”* 174 pages, spiral bound
- *“Training Manual for Successful Marketing through Educational Workshops”* 106 pages
- Printed examples of most of the promotional brochures and booklets in the system
- A spiral bound copy of the workbook *“12 Little-Known Benefits for Senior Veterans or Their Survivors ”*

### **Titles of Folders Found on the Flash Drive That Comes with the System**

- Training Manual for Collaborative Senior Marketing
- Training Manual for Successful Marketing through Educational Workshops
- 1 Basic Instructions for Starting up a Collaborative Senior Marketing Group
- 2 Setting up a Hypothetical Planning Council in Wisconsin
- 3 Educational Workshop Slide Presentations
- 4 Background Knowledge Training
- 5 Promotional Approach Pieces, Brochures and Booklets
- 6 Ghostwritten Articles for Collaborative Group Promotion
- 7 Articles on the Advantages of Collaborative Marketing
- 8 Sample Presentations

## **Description of Material in the Folders on the Flash Drive That Comes with SSM**

### ***Training Manual for Collaborative Senior Marketing (folder on flash drive)***

This training manual comes with your purchase of the *“Successful Senior Marketing System.”* The manual is provided to you in printed form with a spiral binding and as well as being available available in PDF format. This PDF version is included in this folder on the flash drive that comes with the Successful Senior Marketing System. The manual is also available as a free resource online to anyone who wishes to know more about our collaborative marketing philosophy. The training manual consists of the following five chapters:

#### **Chapter 1 – Collaborative Senior Marketing Will Create New Business**

In Chapter 1 we discuss why there is a need to help aging seniors and their children or other supporters with the challenges of the final years. We also address the dilemma that government and business support for aging seniors is a niche market. As a result, scant advertising or promotion for assistance in this marketing niche results in the public not being able to find specific senior services or products. Our solution is to encourage senior service providers in a geographic area to form an alliance and promote themselves as an expert group who can solve aging problems and provide the needed services and products. This Collaborative Marketing Group provides free advice and education. Resulting consultations from the group with children or other supporters of aging seniors should also be provided free of charge and should focus on planning rather than selling services or products. It is our experience that this Collaborative Senior Marketing solution-based approach – creating planning clients – eventually leads to many more sales of services and products than would be expected from a direct sales approach.

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### ***Training Manual for Successful Marketing through Educational Workshops (on flash drive)***

The PDF document found in this folder on the flash drive is also entitled *"Training Manual for Successful Marketing through Educational Workshops."* We also furnish a hardcopy printed version of this manual with the Successful Senior Marketing System. We believe that this manual represents the most comprehensive publication available anywhere on using educational workshops as a marketing strategy. This manual is based on years and years of hands-on experience conducting hundreds of educational workshops that resulted in the sale of senior products and services through a planning process. Educational workshop marketing is an integral part of the function of a Planning Council. It is unlikely that a Collaborative Senior Marketing Group that is solely organized around networking would want to take the effort to organize around educational marketing. On the other hand, if a networking group wants to use

this approach, we provide the training in this manual. The manual comprises 106 pages of instruction and is broken into the following categories.

- Part 1 Understanding Our Educational Marketing Philosophy
- Part 2 Identifying and Securing Your Presentation Venues
- Part 3 Advertising Your Presentation Locations to the Public
- Part 4 Designing Presentations for Each of Your Venue Locations
- Part 5 Organizing and Preparing for Your Presentations
- Part 6 Delivering Your Presentations
- Part 7 Initiating the Planning Process
- Part 8 Filling out the Online Questionnaire and Generating the Report
- Part 9 Presenting the Planning Survey Reports
- Part 10 Completing the Planning Process and Making Sales
- Part 11 An Example of How a Life Resource Planning Council Works Together

### ***1 Basic Instructions for Starting up a Collaborative Senior Marketing Group (on flash drive)***

This folder contains 15 separate training articles that pertain to the various aspects of collaborative marketing. The focus of most of these articles is instruction on how to set up a Local Planning Council. Starting up a Life Resource Planning practice is also addressed.

### ***2 Setting up a Hypothetical Planning Council in Wisconsin (folder on flash drive)***

This folder contains instructions and lists of actual people and organizations for setting up a hypothetical Life Resource Planning Council in southwestern Wisconsin.

### ***3 Educational Workshop Slide Presentations (folder on flash drive)***

This folder contains slide sets, start up presentations, start up workbooks and other slides that are used for marketing through educational workshops. The “*Training Manual for Successful Marketing through Educational Workshops*” provides instructions on how to use this material.

### ***4 Background Knowledge Training (folder on flash drive)***

This folder contains textbooks on senior issues in PDF format. The purpose is to provide a library for members of a collaborative marketing group to educate themselves on issues facing aging seniors and their families. Our marketing models rely heavily on members of the group – especially the group member who might be doing Life Resource Planning – having a good background knowledge of issues facing aging seniors and their families or supporters.

### ***5 Promotional Approach Pieces, Brochures and Booklets (folder on flash drive)***

Contained here are 18 different brochures and booklets that can be used for promotion and advertising. Reference to these materials is contained throughout The “*Training Manual for Collaborative Senior Marketing*.” Printed copies of these materials are also furnished as tangible samples provided with the Successful Senior Marketing System.

### ***6 Ghostwritten Articles for Collaborative Group Promotion (folder on flash drive)***

This folder contains 191 articles pertaining to aging issues and the planning that needs to be done. As a purchaser of the system, you can use these articles as your own in any way you see fit. Perhaps you can use them as part of an email campaign or use them on member websites. We do not update any rates or rate tables contained in these articles. It is up to you to find the most recent rates or reimbursements if you use these articles.

### **7 Articles on the Advantages of Collaborative Marketing (folder on flash drive)**

Over the years, we have produced numerous articles designed to persuade individuals or organizations to use our marketing and planning systems. We include these as they perhaps might help you understand in a different context our marketing philosophy.

### **8 Sample Presentations (folder on flash drive)**

This folder contains 3 different workshop presentations as an example of what you can put together using the 175 slides found in the folder “*Educational Workshop Slide Presentations.*” Use of these presentations is covered in the ***Training Manual for Educational Workshops***. The presentation folders also contain sample workbooks for attendees at these workshops.

## **The “Life Resource Planning System”**

The Life Resource Planning System is available from the National Care Planning Council as a monthly subscription service. This system is entirely online. It is designed so that potential clients such as children of aging seniors or supporters of aging seniors fill out an online questionnaire. The questionnaire software then produces an online “survey report” in PDF format that is downloaded to the planner’s computer. Life resource planning is designed as a way to identify issues that aging seniors and their families might be facing. It is not a formal planning process, but leads to formal planning with financial practitioners, insurance agents, care managers, home care providers, attorneys and so forth. Any number of plans can be produced for the single monthly subscription. Planning questionnaires and survey reports are stored in a private database that is specifically provided to each subscriber of the system.

Our Life Resource Planning System produces two different reports. The first report is called a “Life Resource Survey.” The second report is called a “Retirement Planning Survey.” In Chapters 4 and 5 of the training manual we discuss how to create and present a Life Resource Survey or a Retirement Planning Survey. You will also find the instructions for presenting a Retirement Planning Survey in the section on the LRP homepage that is devoted to retirement planning. Working with aging seniors allows you to interact with their children or supporters.

**REMEMBER, THE LIFE RESOURCE PLANNING SURVEY ADDRESSES THE NEEDS OF AGING SENIORS, BUT YOU ARE ALMOST ALWAYS DEALING WITH THE CHILDREN OR OTHER SUPPORTERS OF THOSE AGING SENIORS AS YOUR CLIENTS. OUR SYSTEM ALSO ALLOWS YOU TO PLAN FOR THEM AS WELL BY DOING A RETIREMENT PLANNING SURVEY. IT IS A 2-FOR-1 PLANNING OPPORTUNITY GENERATED BY 1 LEAD**

The most important thing to keep in mind when you present either of these two survey reports is to avoid a sales approach. You must constantly keep in mind when you are doing the planning that you are not a salesman but you are a planner providing solutions. In the presentation, you should not bring up specific products that you offer, nor must you hammer away at your clients if they don’t agree to your assessment of their problems and your potential solutions. In other words if your solutions include your products and services – even though you don’t mention them – please don’t force them into a decision that you think they should make to buy what you offer. Instead, give them enough information and give them good reasons why they should adopt your solutions, but don’t employ manipulative closing strategies to make them do it. Using this approach, you will sell more products and services than through a direct sales approach.

## **Support for a Local Planning Council from the NCPC**

The difference between a Collaborative Marketing Group and a more formalized Local Planning Council is the degree of commitment from the participating members. Collaborative Senior Marketing Groups typically rely only on networking to generate leads for their participating members. They may also advertise their services to the public through the various recommended strategies in Chapter 2 of the training manual. In contrast, a Local Planning Council creates a more formal organization between members and requires a greater commitment to promote the group. Typically, this involves using educational workshop marketing to create potential clients and using Life Resource Planning to turn those potential clients into actual clients. The Planning Council puts more effort into promotion and advertising including a website, an online request form, online listing services, and support from the National Care Planning Council.

The National Care Planning Council will support the formation of a local Planning Council by providing national and state listing services, a website, an online request form, monthly articles, use of the NCPC logo and membership affiliation, individual consultations and other backroom support. In order to receive this support from the NCPC a Local Planning Council must have at least 5 members, including the Director, and must subscribe to membership with the National Council as well as purchasing a listing on the group's State Care Planning Council website. Contact the National Council at 800-989-8137 or email at [account@longtermcarelink.net](mailto:account@longtermcarelink.net)

## **The CLRP™ Designation (Certified in Life Resource Planning)**

The Society for Life Resource Planning sponsors individuals who desire to earn the “Certified in Life Resource Planning” designation. (CLRP™) By attaining this designation, the graduate will have the background knowledge necessary to successfully execute the Life Resource Planning Process on behalf of potential clients. Here are the requirements for this designation.

### **Requirements for the CLRP Designation**

1. Submission of our online application detailing work experience, special training, educational experience and disclosure of any complaints or legal actions
2. Experience – at least four years full-time experience in a related field or a four-year degree from an accredited university or college or a combination of both such as 2 years of college and 2 years of experience
3. Self-study training from a 549 page textbook in 3 volumes and 2 additional volumes containing 403 practice questions with and without answers
4. A 75% or greater passing grade from a 100 question exam based on the textbook
5. A one-time \$350 fee for the application process, study materials and the testing process
6. Signing a Terms of Use Agreement for the Designation and Society Membership
7. Maintaining a monthly subscription to the Life Resource Planning Software System – \$19/month for the development of an unlimited number of planning reports .
8. Maintaining membership in the Society for Life Resource Planning

## **Requirement for Society Membership**

1. Member must have the CLRP Designation
2. Member will maintain a monthly subscription to the Life Resource Planning Software System – \$19 a month for the production of an unlimited number of planning reports
3. Member agrees to use the LRP System to produce planning Reports for Life Resource Planning clients.
4. Member signs and agrees to abide by a membership agreement

## **A New Society Member Signs an Agreement Containing the Following Elements**

1. Agree to follow certain rules in the public use of the Society logo, the certification ("Certified in Life Resource Planning"), the designation acronym (CLRP) and the disclosure of membership in the Society
2. Agree to abide by certain rules of ethical conduct
3. Agree that the Life Resource Planning Process and use of the Designation and Membership in the Society are not to be used for the sole purpose of selling products or services unless the client specifically understands that products or services might be offered outside of the planning process.
4. Agree that if the Life Resource Planning process results in the sale of products or services the member will provide disclosure to the client that the purpose of the planning was not primarily to provide a sale for products or services, that member business referrals to others will make additional income from commissions or service fees, and that , if applicable, suitable products or services are available from other sources and the client is not obligated to use the products or services.

## **Rules Governing the Use of CLRP and Recognition by the Society**

1. With the exception of the advertising rule below the designation acronym (CLRP), certification statement ("Certified in Life Resource Planning,") the Society logo and disclosure of membership in the Society can be used on business cards and in business literature or on the websites of members where it is allowed by government rules or allowed through the business or professional organization affiliation of the member
2. The designation acronym, the certification statement, the Society logo and advertising of membership in the Society cannot be used in a way that implies this designation endows any additional expertise – other than the presentation of Life Resource Plans – for the person displaying this information in addition to the expertise that person already possesses
3. The designation acronym, the certification statement, the Society logo and advertising of membership in the Society cannot be used in a way that it appears the Society endorses the business or the non-planning activities of the person having this recognition
4. Media promotion – using electronic media, advertising, brochures or other forms of public communication – of the designation acronym , the certification statement, the logo and advertising of membership in the Society must include an explanation as to its meaning; which is the person so recognized as a member of the Society for Life Resource Planning has "received training to present Life Resource Plans for the purpose of assisting planning clients recognize issues to be encountered through the aging process."

### **Special Advertising Rule**

A member of the Society for Life Resource Planning shall not use any form of media to advertise his or her recognition in the Society when the media content or the advertisement includes any form of communication designed to promote, solicit or sell any form of financial product even if the communication does not specifically mention financial products.

"Media" means business cards, brochures, letters, newsletters, mailers, newspapers, magazines, slide show presentations, video presentations, radio, television, emails, websites, Internet social media, billboards or any other like-type of means of communicating a message with the public

"Recognition" means using any form of media to communicate any one or all of the following

1. Membership in the Society for Life Resource Planning
2. Placement of the Society logo
3. Placement of the acronym – CLRP
4. Use of the phrase "certified in Life Resource Planning" or any combination or extract of these words or the use of other similar words that would indicate an expertise in a planning process for aging seniors

"Financial Product" means insurance products, investment products, financial arrangements or any other type of product that promises a monetary return to an individual who commits his or her funds, his or her income or who signs a loan agreement as part of the arrangement

"Advertise" means a written or oral communication designed to promote, solicit or sell a product or service