

# Three advantages to financial professionals partnering with **Chartwell**

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Your senior clients and their families may be facing a number of challenging situations that you aren't aware of, including the need for more support as they age. Depending on the person, this could mean they are considering making home accessibility modifications to remain in their current residence, enlisting meal or homecare services, or even moving to a retirement community or long term care residence.

These decisions can be complex and life-changing, which is why it's important that you understand what options are available to your clients and the financial considerations of each choice.

Here are three reasons to consider partnering with Chartwell Retirement Residences, Canada's largest retirement living operator, so you can bring increased value to your business and clientele:



## 1 Build your knowledge about the retirement living industry to better advise your senior clients and their families

With Chartwell, you will gain access to retirement living education and resources, helping you to grow your expertise in the area of senior support options so you can help clients navigate their choices and lead the best life possible.

For example: consider your clients who are experiencing mobility challenges, memory loss or simply need more daily care, or clients who may've mentioned the difficulty their parents are having with home life. Perhaps they're struggling with maintaining their parent's home, coordinating services like homecare or meals on wheels, grocery delivery, transportation to doctors' visits, cutting grass or snow shoveling, and much more. How can you help?

When you hear about these challenges and understand what options are available, you have an opportunity to steer conversations to solution-based outcomes. By exploring the option of retirement living with your clients—whether it's the senior or the adult child concerned about their parent—you can provide clarity during a confusing and stressful time. This can open the door to an easier, simpler and more worry-free next phase of their life.

## 2

### Grow your clientele through referrals

It's significant to note that many seniors and their families come to Chartwell to explore the option of retirement living before they know if they can afford it. When you partner with them, opportunities may arise for Retirement Living Consultants from Chartwell residences in your area to send clients your way who don't already have a relationship with a financial professional and need guidance before they can commit to moving in—a benefit that helps all parties involved.

While partnering with Chartwell, you'll also be given opportunities to reach their current residents and families, all while promoting your services.



## 3

### Achieve a competitive advantage

Positioning yourself as a holistic advisor with knowledge and expertise about retirement living options will give you a competitive edge in the most uncertain times. There has never been a period that your clients have needed you more to anticipate their needs and point out their blind spots—a truly human skill that technology will never be able to replace!

But, as we know, not all financial professionals are invested in learning more. By you being on top of the retirement living trend, you not only benefit your clients, but may receive unsolicited referrals from others, resulting

in new business from other financial professionals that didn't go the extra mile.

With an explosion of rapidly aging Canadians, what's more important than the security of where they call home, their wellbeing and safety? And, for the adult children of these seniors, they want to see them thrive and flourish, just as we'd want for our own parents and aging loved ones. This is your opportunity to not only serve your clients, but to grow your business while leading the field in your industry.

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Want to connect with a Chartwell Retirement Living Consultant in your area?  
We invite you to contact: