



Certified Senior Advisor (CSA)[®]
CSA Working With Seniors
Three Day Class Review and Exam on Day Four
Tuesday, January 14 – Friday, January 17, 2014 – Houston, TX
Sheraton Houston Brookhollow Hotel

Hotel & Training Location: [Sheraton Houston Brookhollow Hotel](#), 3000 North Loop West, Houston, TX 77092

Phone: 713-688-0100 – **CSA Instructors:** [Jim McCabe](#), [David Stitt](#) and [Mickey Batsell](#) - **Class Room:** Jasmine I & II

Parking: Complimentary self-parking

Transportation: there is no hotel airport shuttle service – Super Shuttle can be pre-arranged for pick up and drop off for \$24 each way, call 713-256-3609 or <http://www.supershuttle.com> Taxi cabs are available for a fee of about \$60 each way. Hotel offers shuttle service to the Galleria shopping and dining for registered guests

Hotel Rate: \$109.00 - please reserve your room prior to **January 6, 2014** to receive the SCSA group rate.
Group: Society of Certified Senior Advisors - For reservations call 1-888-627-8196 – (Goes up to \$169 after the block rate expires)

Internet: free wireless high-speed Internet in guest rooms

Restaurants Information: Cimarron and Tuxedo's are on site at the hotel – hotel front desk had complete list

Happenings in Houston in January: [Houston Events](#)

Airport: [George Bush Intercontinental Airport](#) (IAH) is 24 miles away and about 30 minutes & [William P. Hobby Airport](#) (HOU) is 21 miles away and about 25 minutes away

Dress Code: Business Casual

Materials You Need to Bring: Photo ID, pencil, pen, blue CSA textbook, Power Point Notebook, Exam Study Guide, business cards for networking with other class attendees. The interactive CSA Exam Study Guide is available in your student course portal at <http://courses.csa.us> (need your username and password)

Class Schedule: Class begins promptly at 8 AM and ends at 5 PM each day. Testing is on the fourth day and begins promptly at 8 AM. Please see the Class Schedule for more details.

Networking Opportunities: There will be breaks between class modules, lunch hour and dinner, but on Day 2 from 7:30 AM to 8 AM there is an optional, student introductions time set aside. Come to the classroom and everyone can go around the room and give a 60 second speech, exchange business cards or materials.

Additional Information: Morning (7:30 AM) and afternoon snacks (2 PM) and beverages are provided.

SCSA Contact Information: Judy Rough 800-653-1785 x112 or judy@csa.us – www.csa.us

Reminder: You will be contacted with your exam results by approximately the 12th business day following the exam. This would be about **February 4th** so please mark your calendars!

CSA Class Review Schedule – Houston, TX – January 14 – 17, 2014

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| | | | | 2012 | 2013 |
|---------------|---|-----------------------|-------------------------|------------------|------------------|
| Day 1 | Tuesday, January 14, 2014 | CSA Instructor | Textbk | PPT NB V1 | PPT NB V2 |
| 8:00 - 8:15 | Welcome, Introductions, About SCSA & CSAs | Jim McCabe | Handouts in Blue Folder | | |
| 8:15 - 9:05 | Trends & The Experience of Aging | Jim McCabe | 3 & 103 | 1 | 7 |
| 9:15 - 10:10 | Physiological Changes of Aging / Aging Kit & Hearing Test | Jim McCabe | 45 | 17 | 23 |
| 10:20 - 11:10 | Cognitive Aging | Jim McCabe | 324 | 101 | 35 |
| 11:20 - 12:10 | Mental Health, Grief & Loss in Later Life | Jim McCabe | 76 | 29 | 35 |
| 12:10 - 1:10 | Lunch | | | | |
| 1:10 - 2:00 | Nutrition, Fitness & Healthy Lifestyles | Jim McCabe | 298 | 87 | 93 |
| 2:10 - 3:00 | Aging & Society | Jim McCabe | 16 | 9 | 15 |
| 3:10 - 4:00 | Senior Housing | Jim McCabe | 201 | 27 | 63 |
| 4:10 - 5:00 | Family & Social Support Systems | Jim McCabe | 119 | 39 | 45 |
| Day 2 | Wednesday, January 15, 2014 | CSA Instructor | Textbk | PPT NB V1 | PPT NB V2 |
| 8:00 - 8:05 | Daily Announcements | Jim McCabe | | | |
| 8:05 - 8:55 | Chronic Illness in Seniors | Jim McCabe | 267 | 75 | 81 |
| 9:05 - 9:55 | Home & Community-Based Services | Jim McCabe | 238 | 63 | 69 |
| 10:05 - 11:10 | Caregivers & Caregiving in America | Jim McCabe | 107 | 49 | 55 |
| 11:20 - 12:10 | Spituality | Jim McCabe | 347 | 111 | 117 |
| 12:10 - 1:10 | Lunch | | | | |
| Day 2 | Wednesday, January 15, 2014 | CSA Instructor | Textbk | PPT NB V1 | PPT NB V2 |
| 1:10 - 2:00 | Financial Choices: Retirement (Financial Lit I) | David Stitt | 455 | 131 | 137 |
| 2:10 - 3:00 | Financial Choices: Income Taxes (Financial Lit II) | David Stitt | 475 | 139 | 145 |
| 3:10 - 4:00 | End-of-Life Planning | David Stitt | 366 | 123 | 129 |
| 4:10 - 5:00 | Long-Term Care Coverage | Mickey Batsell | 532 | 155 | 161 |
| Day 3 | Thursday, January 16, 2014 | CSA Instructor | Textbk | PPT NB V1 | PPT NB V2 |
| 8:00 - 8:05 | Daily Announcements | David Stitt | | | |
| 8:05 - 9:10 | Estate Planning (Financial Lit III) | David Stitt | 404 | 147 | 153 |
| 9:20 - 10:10 | <i>Financial Literacy Activities & Discussion</i> | David Stitt | Handouts | | |
| 10:20 - 11:10 | Social Security | David Stitt | 630 | 179 | 185 |
| 11:20 - 12:10 | Medicare | Mickey Batsell | 587 | 161 | 167 |
| 12:10 - 1:10 | Lunch | | | | |
| 1:10 - 2:00 | Medicaid & Seniors | Mickey Batsell | 611 | 171 | 177 |
| 2:10 - 3:00 | <i>Case Studies: Government Programs, LTC</i> | Mickey Batsell | Handouts | | |
| 3:10 - 4:00 | Ethics in Doing Business with Seniors | David Stitt | 651 | 187 | 193 |
| 4:00 - 4:30 | When You Are a CSA | David Stitt | | | 205 |
| 4:30 - 5:00 | Test Taking Tips - Q & A - Closing Remarks | David Stitt | | | i-iv |
| Day 4 | Friday, January 17, 2014 | | | | |
| 8:00 - 11:00 | CSA Exam (results in 12 business days - Feb 4th) | Proctor | | | |