

February 25, 2008

## **Society of Certified Senior Advisors**

### **Updates CSA Code of Professional Responsibility for 2008**

DENVER -- Society of Certified Senior Advisors® (SCSA) recently updated its professional ethics guidelines, the CSA Code of Professional Responsibility, to incorporate separately-drafted 2007 addenda as well as new content created to fulfill requirements for NCCA accreditation.

The CSA Code of Professional Responsibility ("Code") was first published in 2001 as an ethical mandate for Certified Senior Advisors (CSAs) to follow in the course of their business affairs. It has undergone a number of revisions since its initial release, most notably in March 2006, when it was expanded to include advertising guidelines and rules for CSA logo and marks usage, and featured SCSA Membership Rules, an ancillary document which described the administrative and disciplinary roles of SCSA and the CSA Board of Standards.

Among the additions to the 2008 Code:

- New Rule 6 to Appendix A, which requires that CSAs provide to clients or prospective clients, before the completion of a transaction, the CSA Disclosure Statement. (See "SCSA Disclosure Statement" entry on the "CSA Newsroom" page.) The disclosure statement clearly states what the CSA designation is, and what it is not.
- New language in the 2008 Membership Rules that authorizes SCSA to notify state regulators of "wrongful use" of the CSA designation by non-CSAs.
- Language that establishes a new CSA Board appeals process, a requirement for meeting an NCCA accreditation standard for disciplinary review.

"The 2008 version of the CSA Code continues to be an outstanding resource for CSAs with questions ranging from addressing senior concerns to meeting advertising compliance. And it sets very high standards for ethical conduct that every CSA pledges to meet," said SCSA President Ed Pittock, who also noted that the CSA Board of Standards imposes swift discipline to CSAs who are determined to have violated rules and standards in the Code.

The CSA Code of Professional Responsibility is available for viewing and downloading on the SCSA website, [www.csa.us](http://www.csa.us) .