

The Commitment of a CASL®

In all my professional relationships, I pledge myself to the following rule of ethical conduct: I shall, in light of all conditions surrounding those I serve, which I shall make every conscientious effort to ascertain and understand, render that service which, in the same circumstances, I would apply to myself.

"The CASL® designation focuses on the issues facing clients who are planning for or are living in retirement. This five course curriculum was designed to be the most comprehensive designation of its kind and will definitely help meet the needs of older clients."

— David A. Littell, JD, ChFC®, CFP®
Joseph E. Boettner Chair in Research
and Professor of Taxation,
The American College

The mark CASL® is the property of The American College and may be used by individuals who have successfully completed the initial and ongoing certification requirements for this designation.



The CASL® curriculum is administered by The American College in Bryn Mawr, Pennsylvania. Founded in 1927, The American College is the nation's leading educator of professionals in the insurance and financial services industry.

The American College is accredited by:
The Middle States Commission on Higher Education
3624 Market Street, Philadelphia, PA 19104

TheAmericanCollege.edu/CASL

888-263-7265



CASL®
Chartered Advisor for
Senior Living®





CASL[®]

Chartered Advisor for Senior Living[®]

What is a CASL[®]?

A CASL[®], or Chartered Advisor for Senior Living[®], is a financial services expert who has dedicated him or herself to helping their clients prepare for retirement. Having completed an advanced five-course academic curriculum and met the experience and ethics requirements as set forth by The American College, a CASL[®] is:

Knowledgeable

Earning the CASL[®] designation requires professionals to complete 300-400 hours of intensive study and pass a series of five rigorous examinations. CASLs are also required to meet continuing education requirements throughout their careers.

Experienced

Before receiving the CASL[®] designation, advisors are required to have worked with senior clients for a minimum of three years.

Ethical

The American College is committed to promoting and maintaining the highest of ethical standards. All CASL[®] designees are required to adhere to The College's Code of Ethics.

What can a CASL[®] do for you?

Your CASL[®] advisor can provide guidance and assistance on a broad range of financial and lifestyle topics including:

- Saving for retirement
- Structuring distributions from pensions, 401(k)s, 403(b)s, IRAs and Social Security
- Planning for health and long-term care needs
- Developing effective estate planning strategies

Recognized as the top designation in the industry and the most comprehensive education curriculum of its kind, the CASL[®] credential meets all regulatory standards in all 50 states.

Why select a CASL[®]?

Americans are living longer than ever before. A CASL[®] is educated to lead clients from middle age through retirement and assist them with the management, preservation and transfer of wealth.

A CASL[®]...

- Pledges to establish financial and retirement goals that are most beneficial to you
- Pledges to follow the latest industry developments and legislative challenges to help you chart a steady course toward achieving financial security
- Has a minimum of three years of qualifying professional experience
- Is one of a select group within the financial services field to earn this respected credential in retirement planning