

PRESS RELEASE

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Local Interest

Mr. Dave Coletti of Allard Insurance Agencies Ltd. – Wealth Management Division - Qualifies as a Member of “Elder Planning Counselor” Program

Toronto, On – A nationally recognized designation was conferred on **Mr. Dave Coletti** after successfully completing an intense and rigorous test of knowledge regarding current seniors issues. The “Canadian Initiative for Elder Planning Studies” (CIEPS) course was established as a standard of service to seniors for all professionals and business people in providing seniors with high quality services and products that best suit their lives and circumstances. The “Elder Planning Counselor” (EPC) designation will immediately help seniors identify the business people and professionals who have a special interest and proficiency in dealing with them and their needs.

“Studies show that seniors want advisors who understand their life issues and the EPC is the Canadian professional development standard for elder education,” says Thomas Miller, President of CIEPS.

Achieving this designation is a distinguished career milestone, attained only by those who have demonstrated proficiency in all relevant programs about seniors issues, including aging, health issues, financial planning considerations, long term care as well as end of life issues. Doug Stoddart, CEO of Nelson & District Credit Union, said, “We are pleased but not surprised that Dave has passed all the requirements to get the EPC designation. It’s great that he is part of our organization through our wholly owned subsidiary, Allard Insurance Agencies Ltd. Along with our affiliation to Dundee Securities Corporation we anticipate that Dave’s EPC designation will make him a much sought after counselor to many of our seniors adding to the broad client base that we have already established.



Dave Coletti - EPC

In addition to completing the program above, Dave Coletti also recently received a certificate from The Ethical Funds Company for having successfully met the requirements of the Socially Responsible Investing Certification Program.

Nelson & District Credit Union is a community based financial organization with an asset size of over \$140 million and three branches in Nelson, Rossland and on the East Shore.