

SRES® Designation Course
Timed Outline

Day One

Chapter	Duration
Introduction	30 minutes
Chapter 1: Generations	45 minutes
Chapter 2: The 50+ Market	55 minutes
Chapter 3: 21 st Century Retirement	60 minutes
Chapter 4: Aging in Place	75 minutes
Chapter 5: Independent Living	60 minutes
Chapter 6: Housing Options for Assistance	90 minutes

Day Two

Chapter	Duration
Chapter 7: Financing Options	75 minutes
Chapter 8: Tax Matters	50 minutes
Chapter 9: Legal Matters	50 minutes
Chapter 10: Marketing and Outreach	80 minutes
Chapter 11: Working with Buyers and Sellers	60 minutes
Chapter 12: Building a Team and Resource Bank	50 minutes
Exam	60 minutes

Total Instruction Time (exam not included)..... 780 minutes, (13 hours)

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Suggested Time Schedule

Day One

Chapter	Suggested Time Schedule	Duration
Introduction	8:30 am - 9:00 am	30 minutes
1: Generations	9:00 am - 9:45 am	45 minutes
2. The 50+ Market	9:45 am - 10:10 am	25 minutes
Break	10:10 am - 10:30 am	20 minutes
2. The 50+ Market (cont'd)	10:30 am - 11:00 am	30 minutes
3. 21st Century Retirement	11:00 am - 12:00 pm	60 minutes
Lunch Break	12:00 pm - 1:00 pm	60 minutes
4. Aging in Place	1:00 pm - 2:15 pm	75 minutes
Break	2:15 pm - 2:30 pm	15 minutes
5. Independent Living	2:30 pm - 3:30 pm	60 minutes
6. Options for Assistance	3:30 pm - 5:00 pm	90 minutes

Day Two

Chapter	Suggested Time Schedule	Duration
7. Financing Options	8:30 am - 9:45 am	75 minutes
8. Tax Matters	9:45 am - 10:15 am	30 minutes
Break	10:15 am - 10:30 am	15 minutes
8. Tax Matters, (cont'd)	10:30 am - 10:50 am	20 minutes
9. Legal Matters	10:50 am - 11:40 am	50 minutes
10. Marketing and Outreach	11:40 am - 12:00 pm	20 minutes
Lunch Break	12:00 pm - 12:40 pm	40 minutes
10. Marketing and Outreach (cont'd)	12:40 pm - 1:40 pm	60 minutes
11. Working with Buyers and Sellers	1:40 pm - 2:10 pm	30 minutes
Break	2:10 pm - 2:30 pm	20 minutes
11. Working with Buyers and Sellers	2:30 pm - 3:00 pm	30 minutes
12. Building a Team and Resource Bank	3:00 pm - 3:50 pm	50 minutes
Exam		60 minutes

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Introduction	Duration
Course Learning Goal	15 minutes
Learning Objectives.....	
Seniors Real Estate Council.....	
Earning the SRES® Designation	
SRES® Members-Only Benefits	
Icebreaker Exercise: Memory Map.....	15 minutes
Total	30 minutes

Chapter 1. Generations	Duration
Generations.....	10 minutes
Six Living Generations	15 minutes
Test Your Generation IQ	10 minutes
Knowledge Base for the Course.....	10 minutes
Total	45 minutes

Chapter 2: The 50+ Market	Duration
Myths and Realities of Aging	10 minutes
Understanding How We Age.....	5 minutes
Working with Matures	10 minutes
Working with Boomers	10 minutes
The Client Across the Desk.....	3 minutes
Working with Gen-X and Gen-Y	2 minutes
Exercise: Generations	5 minutes
Practitioner Perspective: Paying It Forward	5 minutes
Practitioner Perspective: It Takes a Village.....	5 minutes
Total	55 minutes

Chapter 3: 21st Century Retirement	Duration
Changing Concept of Retirement.....	10 minutes
Impact of the Economic Slump.....	10 minutes
The Ideal Retirement Location.....	10 minutes
Silver Collar Cities.....	
The Good Life	10 minutes
Sandwich Generation, Singles	10 minutes
Home—Anchor or Asset?	10 minutes
Total	60 minutes

Chapter 4: Aging in Place	Duration
Plan for Aging in Place	5 minutes
Planning Continuum for Aging in Place	5 minutes
Make a SAFE Plan for Aging in Place.....	5 minutes

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Aging in Place: the Community.....	10 minutes
Aging in Place: the Home.....	15 minutes
Universal-Design Standards.....	10 minutes
Adapting a Home for Aging in Place.....	15 minutes
Converting a Second Home.....	5 minutes
Opportunities for Real Estate Professionals.....	5 minutes
Total	75 minutes

Chapter 5: Independent Living	Duration
The Housing Cycle.....	10 minutes
Active-Adult Communities.....	10 minutes
Seniors Apartments.....	10 minutes
Cohousing.....	10 minutes
Age-Restricted Communities.....	10 minutes
Housing for Older Persons Act (HOPA).....	10 minutes
Total	60 minutes

Chapter 6: Housing Options for Assistance	Duration
When Is It Time to Make the Next Move?.....	10 minutes
Obstacles.....	10 minutes
Downsizing.....	20 minutes
Activities of Daily Living.....	10 minutes
Congregate Living.....	5 minutes
Assisted Living.....	10 minutes
Continuing Care Retirement Communities.....	5 minutes
Skilled Nursing Facilities.....	5 minutes
More Care Options.....	5 minutes
What will Medicare or Medicaid Pay For?.....	10 minutes
Total	90 minutes

Chapter 7: Financing Options	Duration
Home Equity Conversion Mortgage.....] 5 minutes
What Can a Reverse Mortgage Accomplish?.....	
Reverse Mortgage Refinance, Purchase, or Line of Credit.....] 5 minutes
HECM Fact Sheet.....	
Reverse Mortgage Alternatives.....	5 minutes
Reverse Mortgage Benefits.....] 5 minutes
When Is a Reverse Mortgage Not a Good Idea?.....	
Who Owns the Property?.....] 5 minutes
What Do Heirs Receive?.....	
A Few More FAQs About Reverse Mortgages.....	5 minutes
Counseling—the Important First Step.....	10 minutes

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Scenarios	20 minutes
Family Issues	5 minutes
Opportunities for the Real Estate Professional	5 minutes
Installment Sales	5 minutes
Total	75 minutes

Chapter 8: Tax Matters	Duration
Declaring a Domicile	5 minutes
Understanding Capital Gains Tax	15 minutes
Capital Gains Tax on Primary Residences	
Capital Gains Tax on the Sale of a Converted Second Home	
Estate Tax Issues	10 minutes
Gift Tax	
Generation-Skipping Transfer Tax	5 minutes
Can an IRA Own Real Estate?	
Tax-Deferred 1031 Exchanges	20 minutes
Basic Rules for Tax-Deferred 1031 Exchanges	
Exchanging a Vacation Home	
Personal Residence Received in an Exchange	
Qualified Intermediaries (QIs)	
Why Exchanges Fail	5 minutes
Community Property	
Taxes on Social Security and Pension Income	5 minutes
Total	50 minutes

Chapter 9: Legal Matters	Duration
Risk Management Issues	5 minutes
Confidentiality	5 minutes
Selling Below Market	5 minutes
Power of Attorney	10 minutes
Guardians, Conservators, and Executors	5 minutes
Competency Issues	5 minutes
When a Client Dies or Becomes Incapacitated	5 minutes
Probate	5 minutes
Life Estates and Trusts	
Elder Law Attorney	5 minutes
Checklist for Selecting an Attorney	
Total	50 minutes

Chapter 10: Marketing and Outreach	Duration
The Half-Century Consumer	5 minutes
Prospecting Strategies	10 minutes
Lawful Target Marketing	5 minutes
Your Value Proposition	5 minutes

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Practitioner Perspective: 5 Marketing Strategies for the 50+ Market	5 minutes
Exercise: Your Value Proposition—Why Choose Me? OR	15 minutes
Exercise: Market Outreach	10 minutes
Seminars and Presentations	10 minutes
3-Minute Brainstorming Challenge or Exercise: Market Outreach	10 minutes
Marketing to the 50+ Market on the Web	10 minutes
SRES® Marketing Support	5 minutes
Total	80 minutes

Chapter 11: Working with Buyers and Sellers	Duration
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Providing Assurance.....	5 minutes
The F.O.R.D. Interview	5 minutes
Exercise: The F.O.R.D. Interview	10 minutes
The Big Questions	5 minutes
Viewing and Showing Properties	5 minutes
Sensitivities	5 minutes
Involving Family Members.....	5 minutes
Staying Out of Family Business	5 minutes
Elder Abuse and Neglect	5 minutes
Recognizing Schemes and Scams	5 minutes
Emotional Impact on the Real Estate Professional	5 minutes
Total	60 minutes

Chapter 12: Building a Team and Resource Bank	Duration
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Who Should Be on Your Team?	10 minutes
Vetting Potential Team Members.....	5 minutes
The Seniors Real Estate Specialist® Team.....	5 minutes
More Services	10 minutes
Finding an Elder Law Attorney	10 minutes
Making Prudent Referrals to Experts.....	5 minutes
Organizing Your Resources File.....	5 minutes
Total	50 minutes

Exam **60 minutes**