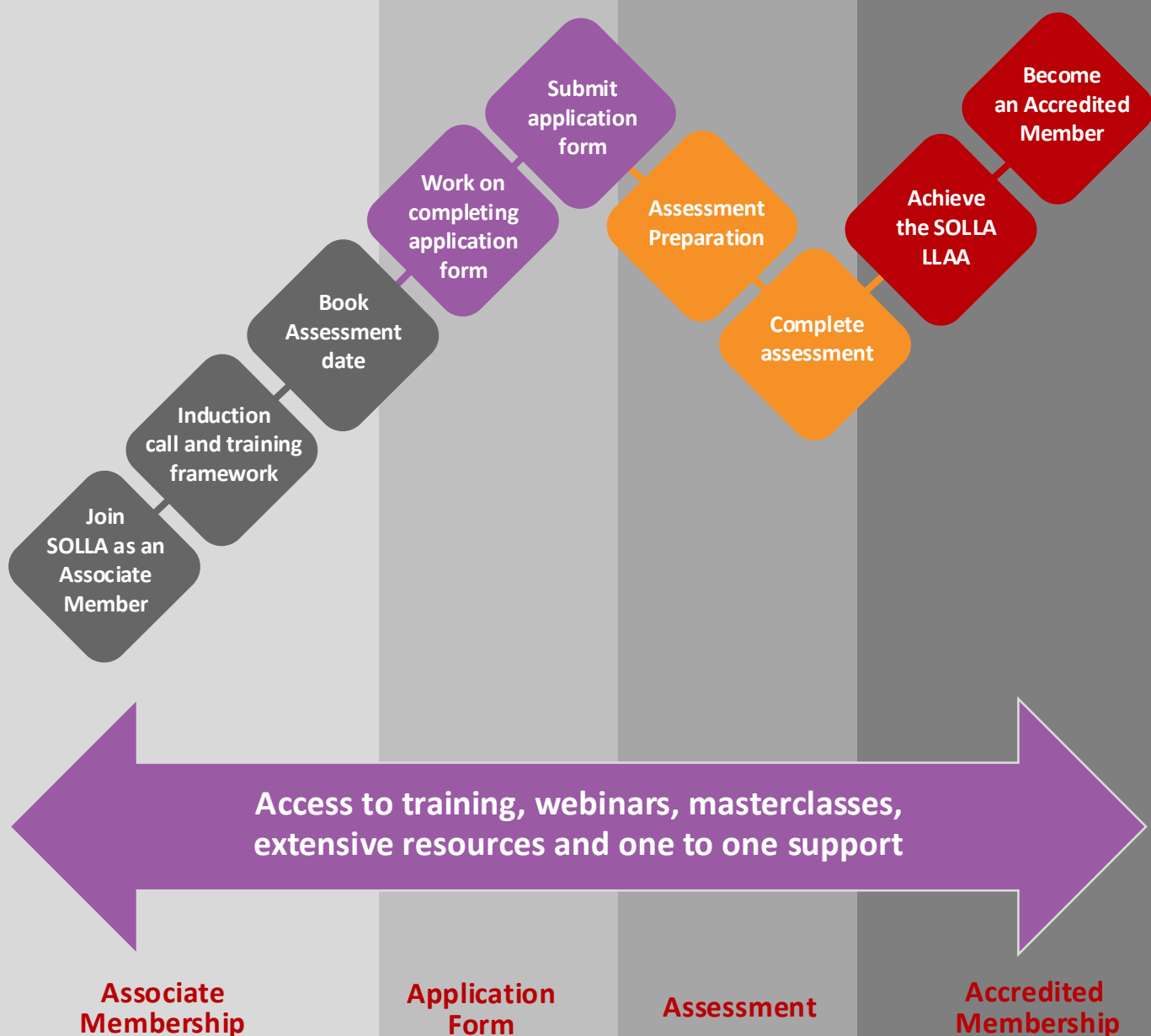


# You could be accredited within a year



# Society of Later Life Advisers

SOLLA's aim is to ensure that consumers can access the highest quality of advice when planning for later life. Advisers who achieve the accreditation are not only fully technically qualified and regulated to provide advice but have taken additional steps to understand the issues faced in later life, the support available from local authorities and the NHS, the legal framework and have developed the soft skills required to communicate these challenging topics.

Achieving the Later Life Adviser Accreditation (LLAA) and becoming a member of SOLLA is an endorsement of your skills and experience of working with, and understanding the needs of, older people and their families and carers. The LLAA gives you independent recognition of your knowledge and advice skills, whilst helping older consumers and their families appreciate you are an adviser who can help them.

SOLLA is a not-for-profit consumer facing organisation, and we support advisers to meet the standards required by the Later Life Adviser Accreditation and their ongoing development.



# Reasons to achieve the accreditation

- ▶ Achieving the Later Life Adviser Accreditation (LLAA) gives **independent recognition** of your knowledge and advice skills and will reassure your clients that you have achieved the **GOLD STANDARD** in later life advice. SOLLA is a consumer facing trusted brand, supported by the regulator, and with Consumer Duty setting higher and clearer standards, achieving the LLAA shows you are putting the client's needs at the heart of what you do.
- ▶ The LLAA is recognised by professional connections such as solicitors and local authorities, who under the Care Act 2014 must now signpost to financial advice when required.
- ▶ Recognition from financial awarding bodies: PFS offer prior learning recognition that the LLAA counts towards achieving Fellowship status and LIBF offer credits towards the Adv DipFA, which can lead to a Chartered Designation.
- ▶ Resources and support from SOLLA to assist you at every step of your journey towards achieving the LLAA and to help you maintain and improve your knowledge and skills.
- ▶ Membership benefits including CPD training webinars free of charge, access to local regional SOLLA network groups giving peer support, website members area resource hub, and regular communications about the later life market.
- ▶ Accredited members details are available to consumers via the SOLLA website, and through our trusted partners.



The **GOLD STANDARD** in financial advice  
for older people and their families

#theSOLLAdifference

# Advice referrals via trusted consumer brands

The LLAA is recognised by other professionals such as solicitors and local authorities who under the Care Act 2014 must now signpost to financial advice when required:

- ▶ Trusted consumer bodies
- ▶ Third sector and other professionals
- ▶ Publications
- ▶ HMRC / Money Helper
- ▶ Local Authorities
- ▶ Care Sector



# FCA vulnerable clients and consumer duty

The Regulator supports the work SOLLA does in the area of later life advice, and with Consumer duty setting higher and clearer standards, achieving the LLAA shows you are putting the client's needs at the heart of what you do.

**“** *We welcome the role organisations like the Society of Later Life Advisers can play in helping consumers find trusted accredited financial advisers who specialise in financial needs in later life.”*

FCA Occasional Paper 31, page 74, paragraph 2



# Understanding the requirements

The LLAA is made up of four standards, and all must be achieved to become accredited. It is not an examination - the LLAA evidences eligibility from an online submission that meets the first three standards, through to a face-to-face assessment and a final accreditation panel decision.

## Standard One Technical Knowledge

In addition to being an FCA regulated adviser, you must be signed off as Level 4 competent and hold a current Statement of Professional Standing, together with appropriate qualifications to demonstrate knowledge in equity release and long-term care advice.

## Standard Two Work within a Supportive Environment

The accreditation is an entirely personal award and cannot be achieved by, or applied to, a firm or practice. However, as part of your assessment, you will need to demonstrate that you operate within a supportive environment which includes resources to help maintain your ongoing 'later life advice' learning and development to ensure that your LLAA standards are maintained. This includes how you maintain knowledge levels and are supported to undertake personal development within the later life sector.

## Standard Three Maintenance of Competence

In addition to meeting professional and regulatory requirements, the accreditation will look to evidence that you have an appropriate amount of Continued Professional Development (CPD) specifically relevant to the older client market.

## Standard Four Application of knowledge and Soft Skills

You must be able to evidence good working knowledge and understanding of the needs, capacity and financial issues when dealing with older clients and their families. It is also important that you have excellent interpersonal and communication skills, such as the ability to explain complex issues in a way that is more easily understood. This is assessed during a one-to-one assessment Viva (interview) with an external approved independent auditor.

# Syllabus areas

The later life syllabus is broad. These are the areas you will need to consider:



[View full syllabus](#)

# Webinar: Introduction to the LLAA

This webinar gives an overview of SOLLA and the Later Life Adviser Accreditation. It will answer some of the most common questions asked by applicants, gives helpful tips and advice to help you complete the application and prepare for the assessment.

## Key learning outcomes

- ▶ Background to the accreditation
- ▶ The four standards
- ▶ The application process
- ▶ The assessment
- ▶ Soft skill requirements
- ▶ Common issues asked by applicants

**“** *I thought the session was a very useful introduction to the accreditation process and it gave me confidence to proceed with my application.*

Nick, SOLLA Adviser

## Webinar presenters

**Jane Finnerty**  
Joint Chair  
SOLLA



**Liv Fergusson**  
Membership Coordinator  
SOLLA



**Vanessa Smith**  
Membership Coordinator  
SOLLA



## Register your place

Please book your place on the Introduction to the Later Life Adviser Accreditation webinar. If you are unable to join live we will send you a recording

**Tuesday 16<sup>th</sup>  
September  
12pm-1pm  
[BOOK HERE](#)**

**Wednesday 21<sup>st</sup>  
October  
12pm – 1pm  
[BOOK HERE](#)**

**Tuesday 10<sup>th</sup>  
November  
12pm – 1pm  
[BOOK HERE](#)**

**Free to attend | One hour CPD**

# Next steps – SOLLA Membership

Interested in taking the LLAA? The next step is to join SOLLA as a Member

**Associate Membership** | For Level 4 Qualified Financial Advisers

**Paraplanner Membership** | For Professional Paraplanners

**Foundation Membership** | For those working toward Level 4 qualification

Membership is a great starting point to work towards the LLAA, benefits include:

- ▶ Grow your credibility with the official member logo
- ▶ Enjoy free training through regular, accessible CPD webinars
- ▶ Simplify your workday using the comprehensive SOLLA Resource Hub
- ▶ Find your community at welcoming regional network meetings
- ▶ Get answers fast with direct backing and guidance from our team
- ▶ Never miss a beat on important industry and regulatory changes

## Membership costs

- ▶ **Associate** (£25/mo or £300/yr): Boost your professional credibility.
- ▶ **Paraplanner** (£25/mo or £300/yr): Build knowledge and confidence.
- ▶ **Foundation** (£14/mo or £168/yr): Build your foundational knowledge.

## Get your membership fee back!

We love supporting your growth. When you book your full LLAA assessment, your £300 Associate fee is fully credited toward the cost—reducing your assessment booking from £1,050 to £750.

[Click here to apply for your SOLLA membership](#)

“2025 may just be the best year of my career so far! I’m thrilled to share that I’ve successfully completed and passed my re-accreditation for the Society of Later Life Advisers.

*This accreditation is so much more than a badge – I see its value every day when working with clients and collaborating with other advisers. It ensures we approach advice with care, compassion, and empathy, considering the whole picture of a client and their families lives rather than focusing on a single product. It’s about creating a robust, adaptable plan that evolves as life changes.*

*If you work with vulnerable clients – whether older or younger – I highly recommend looking into this accreditation. It’s a fantastic way to demonstrate commitment to doing what’s right for clients and delivering advice that truly makes a difference.. Thank you again to everyone at SOLLA that supported me in the re-accreditation process.”*

Sophie Smith, Joyful Wealth

# SOLLA Support Team

The SOLLA team are here to assist you at every step in your journey, through Associate membership to achieving the accreditation.

## Liv Fergusson

### Membership Coordinator



Telephone: 0333 2020 454

Email: [liv@societyoflaterlifeadvisers.co.uk](mailto:liv@societyoflaterlifeadvisers.co.uk)

Liv is available to introduce new members to SOLLA, help them make the most of their membership, and provide guidance on when they are ready to take the accreditation.

## Kate Monda

### Accreditation Coordinator



Telephone: 0333 2020 454

Direct Number: 07572 985205

Email: [kate@societyoflaterlifeadvisers.co.uk](mailto:kate@societyoflaterlifeadvisers.co.uk)

Kate is available to support candidates through the accreditation process, from submitting their application form through to preparing for their assessment.

## Vanessa Smith

### Membership Coordinator



Telephone: 0333 2020 454

Direct Number: 07345 587832

Email: [vanessa@societyoflaterlifeadvisers.co.uk](mailto:vanessa@societyoflaterlifeadvisers.co.uk)

Vanessa is available to help your advisers access a bespoke SOLLA Associate pathway, all designed to help advisers feel better equipped to have confident later-life conversations.

“

*I'm really happy to share that I've passed my Society of Later Life Advisers Accreditation!*

*This has been one of the most valuable learning experiences of my career so far. The process really reinforced the importance of empathy, patience and clear communication when supporting clients in later life or vulnerable situations, and I've already seen the difference this knowledge makes in real conversations with clients and their families.*

*If you're an adviser working in this space, or even just considering it, I'd really encourage you to explore the accreditation. It stretches you in all the right ways and gives you tools that go far beyond the technical, which is so important in the world we're living in.*

*A big thank you to SOLLA and to Progeny for the support throughout. I'm really proud to have achieved this and excited to keep building on it.”*

Nick Parkes, Progeny Group



## **Society of Later Life Advisers**

0333 2020 454

[admin@societyoflaterlifeadvisers.co.uk](mailto:admin@societyoflaterlifeadvisers.co.uk)

[www.societyoflaterlifeadvisers.co.uk](http://www.societyoflaterlifeadvisers.co.uk)

[facebook.com/SOLLAadvice](https://facebook.com/SOLLAadvice)

[linkedin.com/company/society-of-later-life-advisers](https://linkedin.com/company/society-of-later-life-advisers)