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Wednesday, April 18, 2007

## Group offers one-stop shopping for seniors

by Melissa J. Brachfeld | Staff Writer  
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Planning for retirement includes much more than getting just a 401K in order.

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With that in mind, a group of Montgomery County professionals have formed the SR Alliance of Suburban Maryland in order to ensure that seniors and caregivers can find trusted and professional services to meet their financial, legal, residential, building, construction and even organizational needs, organizers say.

Lois Fishman, a certified senior advisor and executive director of the organization, said the group of nine professionals joined together in 2006 to form the networking organization, which is based in Rockville.

She said the SR Alliance — its initials stand for “service” and “respect” — takes a holistic approach to the retirement planning process by connecting seniors and caregivers with a network of planning experts dedicated to the local community. The group, she said, is accredited by the Society of Certified Senior Advisors.

Essentially, she said, the organization serves as a one-stop shop for seniors and their families.

“We have each been serving the needs of seniors on an individual basis for many years,” Fishman, a Derwood resident, said. “We chose to join forces and essentially offer seniors one trusted, central resource that would fit many needs.”

The group, Fishman said, will formally introduce itself to the public Thursday at La Madeleine in Rockville. In the fall, Fishman said, the group held a financial fair at the Rockville Senior Center.

“The reception from the community, so far, has been excellent,” Fishman said

Fishman said she has been professionally accredited by the Society of Certified Senior Advisors to ensure that the SR Alliance is properly trained to focus on the issues of seniors and their families. Fishman added that she has been in the financial planning field since 1983 and has worked with many elderly clients and their families over the years.

The SR Alliance, she noted, meets monthly to learn about senior issues, how it can better serve seniors and how its member can accelerate their own professional development.

### If You Go

The SR Alliance of Suburban Maryland will formally introduce itself to the community with a free breakfast 8-10 a.m. Thursday at La Madeleine in Mid-Pike Plaza in Rockville. Interested parties must RSVP by calling 301-330-9455 or sending an e-mail to [info@srasubmd.com](mailto:info@srasubmd.com).

The Web site also contains contact information and details on each business involved in the SR Alliance, along with resources to assist in their pre- or post-retirement planning.

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