

Living A Legacy Curriculum Outline

The purpose of this document is to help you map out the workshop or course you would like to facilitate. This document is meant to give a high-level overview of the various components of the course/workshop offered.

Course Purpose: The purpose of this workshop is to help inform and inspire older adults above the age of 60 to take their financial future into their own hands. Furthermore, it teaches them how to avoid risky financial decisions.

Demographic: Older adults and individuals with Disabilities over the age of 45

Course Application Styles: In person (flash presentation; 2, 4, and 6-week programs. Virtual, and Hybrid (would strongly prefer not to)

Topic	Content	Activity
Savings	Different Types of Saving Accounts can: help accumulate wealth; allow you to save even with the current benefits package participants may receive (stable account)	Slide Deck; Written exercise; and Discussion about the topics; stable account
Entitlements and Benefits	This topic is to provide clarity on the different types of benefits that exist for an older adult and where they can access them	Slide Deck, contact encouragement; Infographics that clearly delineate the difference in the different types of benefits
Fraud and Scam Prevent	This topic is meant to provide information on frauds and scams, secondly, its to provide defense strategies to older adults	Slide Deck, Contact encouragement with organizations that specialize in preventing or addressing fraud
Will and Estate Planning	This topic is meant to provide context on will and estate planning. Furthermore is meant to provide details on why it's important. This section should also provide resources and organizations to reach out to help with will and estate planning	Slide Deck; Visual Handouts that show the importance and the process of will and estate planning; Activities that go through different scenarios as to why it would have been smart or beneficial to commence planning for after death.
End-of-Life Planning	This topic is meant to educate older adults on the importance of planning on end-of-life circumstances as but not limited to power of attorney; medical power of attorney; Establishing a Trust to stop disputes occurring after life	Slide Deck; infographic; small videos about the end of life planning
Abuse and Neglect	This topic is meant to discuss abuse and neglect and how it's relevant to financial literacy. Secondly, it meant to describe ways to avoid or add	Slide Deck; Infographics; activities, and discussion on different types of abuse and neglect; provide resources and connections to help address suspected abuse or neglect, open discussion.

Living A Legacy Curriculum Outline

Course Purpose = is a 1-2 sentence explanation of why this course is needed and how it will help individuals improve their financial management skills.

Demographic: What is the specific population you are serving? Why is it they need this course to improve their financial management skills?

Course Application Styles = Based on circumstance what are the different ways this course could be facilitated? Could be held virtually, in person in flash sessions (1-4 hour workshops), or 2 4 or 6-week courses. Think about the different ways you can envision this course being taught.

Topic = Based on the population you seek to work with what are the various topics that are relevant to them?

Content= What are the concepts and tools used to ensure the information is retained and applied to everyday life?

Activity = To help individuals understand and apply the concepts learned what are the activities you would like participants to do? Is it a discussion? Is it

Infographic Information:

****Page 1:****

1. ****Introduction:****

- Brief overview of the importance of financial literacy for older adults.
- Statistics on financial challenges faced by older adults.

2. ****Savings:****

- Importance of saving for retirement.
- Types of retirement accounts (e.g., 401(k), IRA) and their benefits.
- Tips for effective retirement savings.

3. ****Entitlements and Benefits:****

- Explanation of social security benefits.
- Other entitlement programs available for seniors (e.g., Medicare, Medicaid).
- How to access and maximize benefits.

****Page 2:****

4. ****Fraud and Scam Prevention:****

- Common financial scams targeting older adults (e.g., identity theft, investment fraud).
- Warning signs of scams and how to protect oneself.
- Resources for reporting and seeking help if scammed.

5. ****Will and Estate Planning:****

- Importance of having a will and estate plan.

Living A Legacy Curriculum Outline

- Key components of a will (e.g., beneficiaries, assets).
- How to create or update a will and ensure it reflects one's wishes.

6. **End-of-Life Planning:**

- Discussion on end-of-life care options (e.g., hospice, palliative care).
- Advance directives and healthcare proxies.
- Conversations to have with loved ones about end-of-life preferences.

7. **Abuse and Neglect:**

- Types of elder abuse (e.g., financial, emotional, physical).
- Signs of abuse and neglect.
- Reporting procedures and support services for victims.

Conclusion:

- Recap of key points from each topic.
- Encouragement for older adults to continue learning about financial literacy and seek professional guidance when needed.
- Contact information for relevant organizations or resources for further assistance.

Would you like to add or modify any information in this outline?