
APPENDIX 1

3 Easy Steps to a Great Seminar!

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1 Training's Not Like Your Other Educational Experiences (especially law school!)

Training needs to follow a different model than your other years of education. In deciding what information to present and how to present it, consider the following:

- ☑ Relevance - Figure out who your audience is and what they most want/need to know. Tell the group why this is important to them: "Even the most knowledgeable people often miss this issue."
- ☑ Practicality - Tell the group how to use the information in their lives: "Everyone should have a . . ."
- ☑ Applicability - What your audience wants most is information they can use immediately. Your presentation's key points should be applicable now. If necessary, explain why.
- ☑ Don't try to cover too much. This is the most common error.

2 Involve Your Audience

*I Hear, and I Forget
I See, and I Remember
I Do, and I Understand*

Participants take an active role in training only when the trainer sets up certain conditions. Create those conditions.

- ☑ Tell the group what to expect. Say something like: "I'll be covering the topic and will ask for questions," or "Raise questions anytime."
- ☑ Prepare open-ended questions to draw out the group at various points.

- ☑ Involve the group early on in the presentation. Ask for a show of hands on participants' experience. Ask a few specific questions to gauge knowledge and expertise.
- ☑ Use small problems throughout.
- ☑ Identify subtopics to develop lists of pros and cons, solutions or issues from the group. Don't make up the list yourself. Let the group do it.
- ☑ Ask group members to share their experience on key points. You could say, "Has anyone experienced a similar problem?" Choose a non-private topic.
- ☑ Plan your training to incorporate participatory training styles (discussion, problem solving). Even a 2-1/2 hour seminar benefits from a mix of techniques.
- ☑ Pose a problem to the group in the opening and explore possible solutions as you speak.
- ☑ Use the self-test to review learning.

Remember: Your effectiveness as a presenter is measured not by how much you say but by what they remember.

3 Keep Your Audience Interested

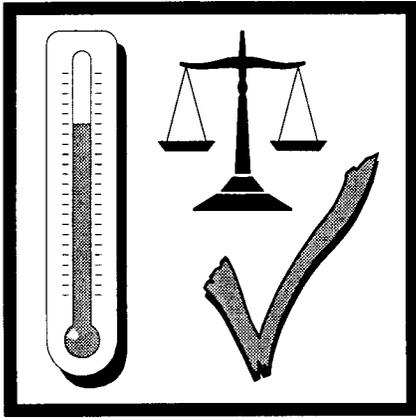
Modern communication trains audiences to messages measured in 30-second sound bites. The mass media play to the estimated average adult attention span of 20-30 minutes. To keep participants alert:

- ☑ Use visuals – flipcharts, overheads, slides, and verbal imagery.
- ☑ Vary your delivery style several times per hour. Use lectures, discussion, problem solving, and issues from the group.
- ☑ Personalize your responses. Take time to create a seating chart.

Appendix 2

Overhead Transparencies

These can be easily reproduced into transparencies designed for plain paper copiers.
Or you can use these as ideas for flipcharts.

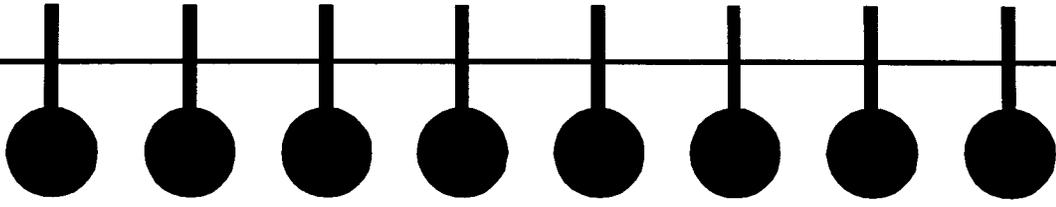


Welcome to the Legal Checkup

Attorney:

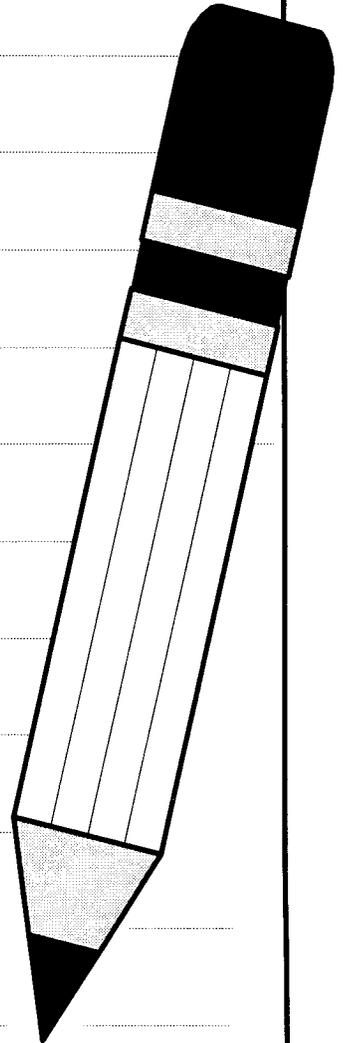
Sponsor:

INTRO



Seminar Goals

- to diagnose any legal problems
- to assist you to prevent or solve legal problems on your own
- to produce a “next steps” personal plan



GOAL

An illustration of a black easel with a white rectangular sign attached to its top. The sign has two black dots at the top, representing fasteners. The sign contains the word 'Agenda' in a large, bold, black font, followed by a list of six items, each preceded by a checkmark in a square box. The list items are: 'Essential Records', 'Powers of Attorney', 'Advance Directives', 'Wills & Trusts', 'Joint Ownership', and 'Other topics?'. A small white triangle is drawn at the bottom right corner of the sign, suggesting a folded corner. The easel's legs are thick black lines forming a tripod shape.

Agenda

- Essential Records**
- Powers of Attorney**
- Advance Directives**
- Wills & Trusts**
- Joint Ownership**
- Other topics?**

Personal Records

- Birth/adoption
- Death
- Marriage/Divorce
- Citizenship
- Military
- Others?

Financial Records

- Bank records
- Deed
- Insurance policies
- Investments
- Tax returns
- Pension plan info

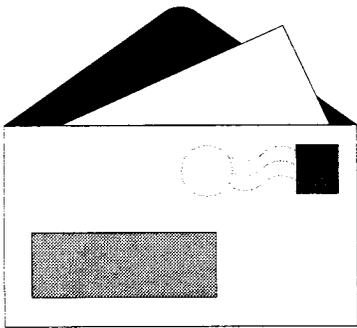
How to Get Vital Records

CONTACT:

**U.S. Dept. of Health and
Human Services (HHS):**

ASK FOR:

No. PHS 93-1142



ORDER FROM:

**A local Government
Printing Office**

OR



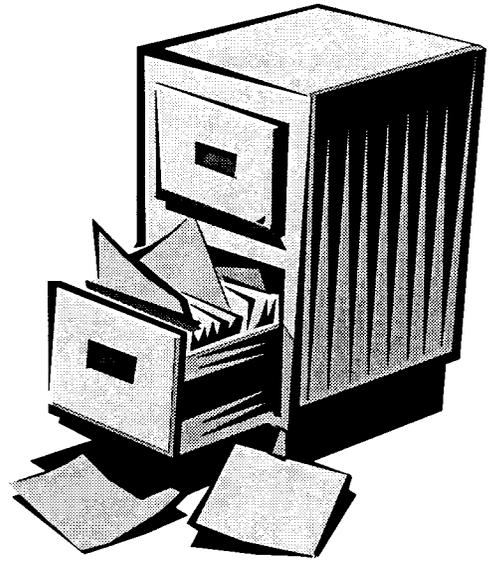
CALL:

**The National Center
for Health Statistics –
Hyattsville, Maryland**

HHS phone: (800) 332-6347

VITAL

Documents You Should Store



No. Years



DOC

Power of Attorney



- T F** 1. I must appoint a lawyer as my "attorney-in-fact."
- T F** 2. If I have more than one child, I should appoint all of them as co-attorneys-in-fact.
- T F** 3. If I appoint an attorney-in-fact, I lose my right to handle my own affairs.
- T F** 4. My attorney-in-fact cannot be held personally liable for my debts.
- T F** 5. The person I designate as the executor in my will has automatic legal authority to be my attorney-in-fact if I become disabled during my lifetime.

QUIZ

Power of Attorney



WHY?

WHAT TYPES?

- general**
- limited**
- financial**
- health-care**

COMPARISON

HCPOA

- choose an agent
- ordinary health care AND end-of-life decisions

VS.

LIVING WILL

- give specific directions
- end-of-life decisions only

HCPOA

Who Inherits Intestate If There is No Will?

1

2

3

4

5



HEIR

Should I Have A Living Trust?

PROs:

- Avoids probate
- Can administer property in different states with 1 document
- Can manage affairs during life
- Beneficiary usually receives assets faster
- Privacy

CONs:

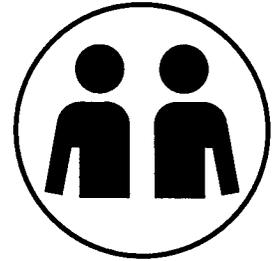
- Often no large estate tax savings
- Expensive to draft

Individual Decision

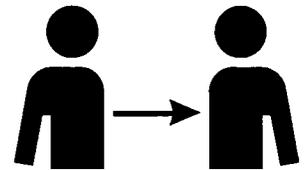
TRUST

Joint Ownership

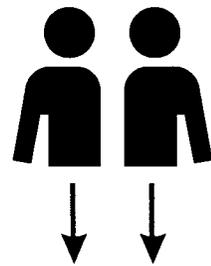
👉 **Tenancy-by-entireties**



👉 **Joint Tenancy with rights of survivorship**



👉 **Tenancy-in-common**



Issues to Consider:

- ☑ **You want to sell**
- ☑ **One of the owners dies**
- ☑ **You are sued**
- ☑ **Judgment entered against the property**

JOINT

Appendix 3

Dear Colleague Letter

Dear Colleague,

Attorney (*ATTORNEY'S NAME*) is pleased to offer a preventive law program, the *Legal Checkup*, developed by the American Association of Retired Persons (AARP). The Project's purpose is to assist individuals in identifying hidden legal problems and acting to correct those problems before they erupt into major crises. It is analogous to a routine medical checkup designed to diagnose a problem at an early stage when the odds of a cure are the highest.

The program is unique. It goes beyond a purely informational seminar. A *Workbook* is provided to those who sign up for the program. It is a written exercise which guides individuals through a detailed assessment of their own legal affairs. Completion of the Workbook leads to creation of a written personal plan specifying individual problems and actions needed to correct the problems. Participants will attend a seminar conducted by (*ATTORNEY'S NAME*) who will be able to answer any questions about the personal plans.

Circumstances where legal problems might exist occur in a broad range of situations. They may be as simple as not being able to locate important documents. They may be more complicated, such as having set up joint accounts or having added names to a deed without knowing the possible consequences.

Each program is preceded by an information and publicity campaign designed to explain why the issue of legal health is so important, advertise the time, place and date of the Checkup, and advise those planning to attend about how they prepare for the seminar. The program takes special care to emphasize that organizing one's legal affairs must be accomplished while one is mentally alert, and that failure to have everything in order in the event of a disabling illness or injury can cause great inconvenience and expense to the family.

The seminar provides an accessible, low-cost forum which helps to get past the often cited excuse, "I want to get organized, but I just don't have the time right now." It also addresses some very common misconceptions about legal issues.

The importance of legal health has increased as the older population has grown and as our medical technology has advanced. The numerous problems created for individuals and their families as a result of the failure to have their affairs in order have created a flurry of activity by various organizations and agencies to provide information.

What is the Legal Checkup Seminar?

The Legal Checkup Seminar provides an opportunity for individuals to gain control of their legal affairs by completing a personalized workbook and following a personal plan afterwards.

The Checkup setting enables attendees to prepare these important legal workbooks very economically on their own. The seminar makes sure that their questions are answered by a licensed, practicing attorney. This avoids concerns about private attorney fees and empowers the individual by providing the means to resolve their legal problems.

Who developed the Legal Checkup?

The Legal Checkup was developed by the National Center for Preventive Law (NCPL) and Legal Counsel for the Elderly (LCE), a department of the American Association of Retired Persons (AARP).

LCE is a national resource center on legal issues affecting the elderly, providing information, technical assistance, and other support to legal services programs for older citizens across the country. In addition, LCE operates or assists a number of statewide legal hotline programs.

The Legal Checkup has been successfully tested in Pennsylvania by staff of LCE's Legal Hotline program in Pennsylvania. The Hotline, located in Pittsburgh, provides legal advice over the telephone for over 9,000 older Pennsylvanians annually.

How does the Legal Checkup Seminar actually work?

The Legal Checkup Seminar works best with a local sponsoring organization that has the capacity to provide the publicity and logistical support required for a successful program. Successful Checkups have been sponsored by hospitals, senior citizen centers, and residential facilities, to name a few. The coordinator's responsibilities are:

