

**Coordinator's
Guide
For
Extension Educators**

The Legal Checkup seminar program was originally developed in 1993 as a joint project of Legal Counsel for the Elderly (LCE), a department of AARP, and the National Center for Preventive Law, Inc., located in Denver, CO. Since 1996, the Legal Checkup has been administered through the AARP Legal Services Network (LSN) and is conducted by currently participating LSN attorneys or by other state-licensed attorneys of Extensions choosing. LSN attorneys provide free and reduced-fee legal services to AARP members. LSN is sponsored by AARP and administered through AARP Services, Inc.

This version of the Legal Checkup Coordinator's Guide was developed expressly for use by Cooperative Extension educators. The AARP Legal Services Network (LSN) and Cooperative Extension are working together in a unique partnership to provide Legal Checkup seminars through the national Extension system. The Extension components of this guide were kindly provided by Jan Bennett, Educator with University of Florida Extension in Collier County, whose successful experience in 2001 with the Legal Checkup was part of the impetus for developing this partnership. All other components were developed by Jane Margesson, LSN Senior Marketing Analyst, and any questions about the guide should be addressed to her at (800) 633-4496 x 115, jmargesson@aarp.org.

This Guide is the only material that has been adapted for use by Extension Educators. The Legal Checkup LSN Attorney's Guide and state-specific Legal Checkup participants' workbooks may not be changed without express permission of the LSN. All materials are copyrighted.

Cooperative Extension, a national educational network established through legislation, is a partnership of the U.S. Department of Agriculture, state land-grant universities, and county governments. Programs are open to all citizens without regard to race, color, sex, handicap, religion, age, or national origin.

Additional information about the LSN can be found at www.aarp.org/LSN.

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Coordinator's Guide For Cooperative Extension Introduction

This **Coordinator's Guide** provides a detailed explanation of the Extension coordinator's role in conducting a successful Legal Checkup program. It covers everything from your decision to conduct the seminar to the participant's leaving the seminar site. There is room for flexibility with tips on making it all work.

Using the Coordinator's Guide

No special training is required

5 easy-to-follow steps

Choose one person in the office to coordinate the seminar activities

You need a good understanding of the Legal Checkup seminar

The success of the program depends on your commitment to the essential tasks described in the following pages

In addition, we would like to offer the following brief explanation of Extension's initial collaboration with LSN which may help you further understand the benefit of this program.

AARP Legal Services Network (LSN)

The AARP Legal Services Network is composed of approximately 1,000 attorneys who provide free and reduced-fee legal services to AARP members nationwide. (As of the last update, the LSN was in 47 states and DC with plans to continue its expansion).

LSN attorneys have been screened to meet strict LSN standards of experience and customer service and many LSN attorneys choose to conduct Legal Checkup seminars as part of their LSN participation.

Whether or not the programs are conducted by LSN attorneys or other licensed attorneys, Legal Checkup seminars are not exclusive to AARP members. The seminars are also open to attendees of any age.

Cooperative Extension

It was determined, especially after 5 successful Legal Checkups in Florida, that Extension would be the ideal co-sponsor for this program. Extension educators are experts in audience targeting and recruiting, as well as non-formal educational strategies and program evaluation research. In addition, legal issues are an important component of the new national Extension initiative entitled *Financial Security in Later Life*.

Mechanics of the 2001 Florida Extension Programs

These are the characteristics of these programs that made them successful:

Location – Because the Extension office was located many miles from town, the program was held at an assisted-living facility (they were thrilled to host it as it's an opportunity to expose their facility to the public); they provided table and chair set-up in their multi-purpose room and also provided refreshments.

Publicity – general press release to local newspapers; 4 articles in Agent's weekly column; bulk mailing to past county Extension financial management program participants and the churches; flyers in public places; the schedule was also published on AARP's web site

Visibility for Extension is essential – The Extension educator made it a point to let the audience know that Extension was responsible for local coordination of the program.

Fees – \$10.00 per person with each receiving a workbook was the fee set in Collier County (see AARP guidelines). Fees were non-refundable once the workbook was mailed.

The Extension Office duplicated and mailed out workbooks (covered in fee), and scheduled participants for the seminar.

Visibility for Extension – Extension included their own Cover Letter with the Workbook mailing (see sample "Cover Letter for Seminar Workbook")

Visibility for Extension -- The Extension Educator delivered a brief introduction.

A University of Florida Extension brochure was distributed to each participant, in addition to information and flyers on other programs offered by Extension locally.

Extension also shared local/state/national resources (for example, the Consumer Credit Counseling Service, county lawyers' referral service, the Federal Gov't.'s Consumer Action Handbook)

Extension distributed and collected Evaluations (see sample "Post-Survey Evaluation")

Mailed additional AARP self-help publications upon request (and charged for duplication and postage – page 64 in Workbook version used)

Results

Extension, in collaboration with LSN, can offer a unique opportunity for individuals to analyze the state of their "legal health" and create a personal action plan to correct problems before they develop into major crises.

Exciting results from Extension's first programs!

5 Legal Checkups were held in Collier County, FL in March, 2001

167 individuals were mailed a workbook after registering

129 attended a seminar

118 (93%) completed evaluations

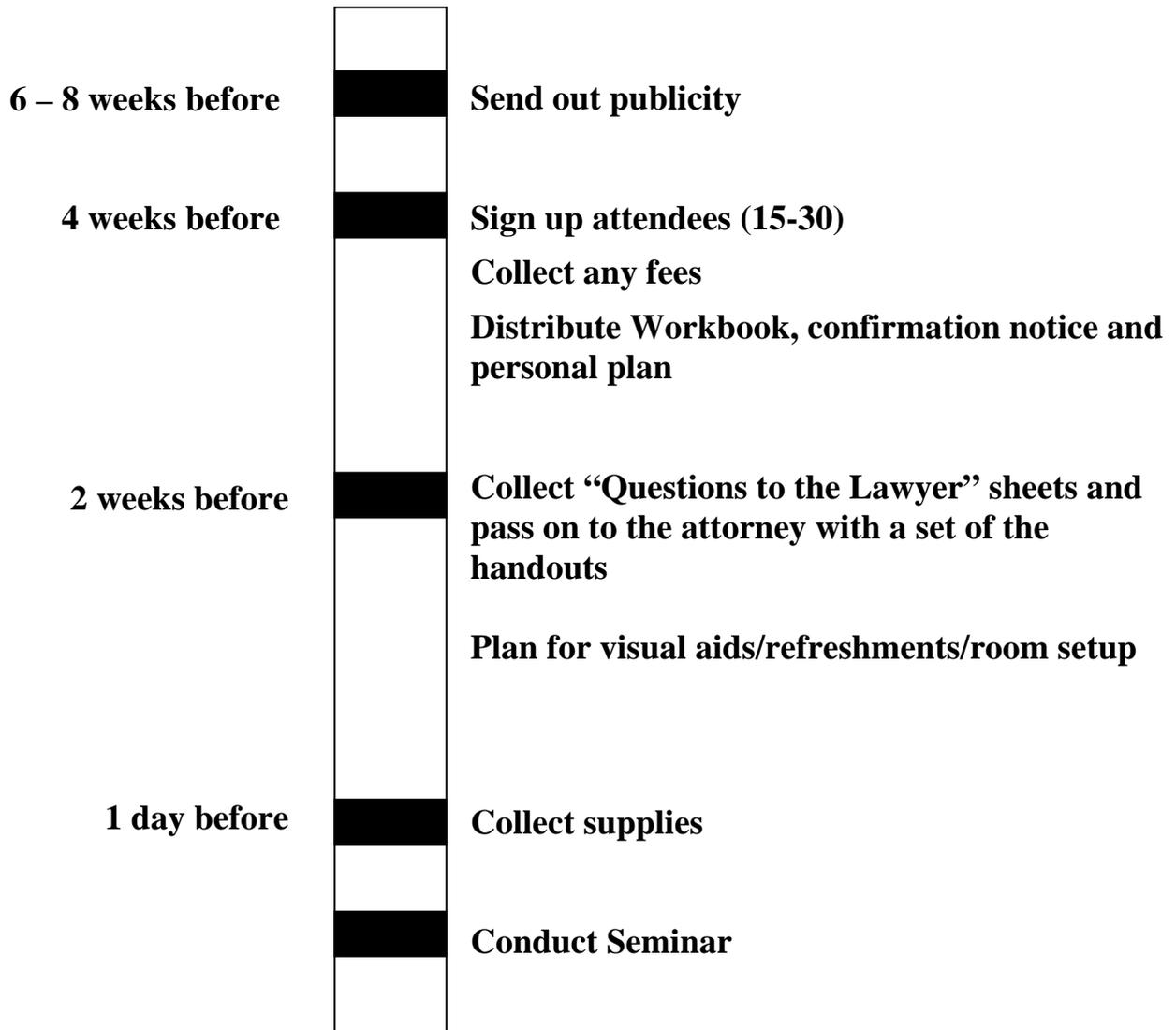
117 (99%) reported that the program increased their knowledge, or helped them gain some useful ideas that would strengthen their legal health

105 (89%) put the information and ideas provided into practice

111 (94%) felt their own personal evaluation of their legal health would benefit them financially and/or emotionally (i.e. peace of mind)

How can Extension Educators and Extension clientele check on their "legal health?" The answer is the LEGAL CHECKUP SEMINAR!

Legal Checkup Seminar Timeline



Objective of the Legal Checkup

1. WHAT IS THE OBJECTIVE OF THE LEGAL CHECKUP?

The Legal Checkup program is designed to educate the public about the issue of “legal health,” encourage individuals to make a detailed evaluation of the state of their own legal health, and suggest resources available to provide self-help or professional assistance. Individuals will create a personal action plan to correct any problems that are identified during the seminar before they develop into major crises. It is analogous to a medical checkup designed to uncover health problems at the earliest stage, to provide advice on good health habits and to set up treatment plans for any problems that might be discovered.

2. HOW IS THE PROGRAM STRUCTURED?

The program consists of two parts. Participants receive a detailed and confidential workbook that includes questions designed to evaluate their legal health. It includes explanations as to why specific questions are important as well as other pertinent information. Participants complete the workbook at home before the seminar and in doing so develop their own personal plan. The workbook includes a resource list and a glossary of terms.

A live seminar, conducted by either an LSN attorney or any attorney licensed in the state, is then offered in cooperation with Extension. This gives participants an opportunity to ask questions about any matters requiring clarification. The program emphasizes self-help, which is often adequate to correct problems. It also provides information about local resources for information, general assistance, and professional referrals for those situations where required.

3. HOW DO I LOCATE ATTORNEYS TO CONDUCT THE SEMINARS?

The complete list of LSN attorneys in each state and community can be found on the LSN website at www.aarp.org/LSN. If no attorney is listed in the Extension Educator's area, or if the LSN attorneys does not wish to conduct the seminar, the Educator can ask any attorney licensed in the state to conduct the program. The Educator can ask the attorney to submit an application to the LSN if they are interested in joining. Most attorneys enjoy reaching this clientele group, broadening their exposure, and providing community service through these seminars.

* *PLEASE NOTE:* Although any licensed attorney can conduct these programs, LSN requests that Extension educators give first-refusal rights to LSN attorneys. If no interested attorneys are available, Educators may work with any licensed attorney. Generally, attorneys interested in conducting Legal Checkup seminars will practice in the areas of estate planning, elder law, general practice or similar areas.

Although LSN does not require specific screening of non-LSN attorneys conducting these programs, all attorneys must be licensed to practice in their state. For information purposes only, the following are some of the basic requirements of attorneys participating in the LSN itself:

1. Must have 4 years of legal experience in all practice areas listed with the LSN
2. Must devote at least 20% of current practice to those legal areas
3. Must carry malpractice insurance and be in good standing with the bar (both checked annually)

About the Materials

All materials available at www.reeusda.gov/ecs/fsll/legal.htm

1. **THE LEGAL CHECKUP WORKBOOK AND PERSONAL PLAN**

This 75-page state-specific document is the core of the program. It is sent to each registered participant several weeks before the two-hour seminar. The workbook contains valuable legal information and guides each participant through an analysis of his or her legal affairs. Although not every section will apply to each person's situation, everyone will benefit from recording their legal data. Included in the workbook is a Personal Plan for the participants to fill out. This will eventually become their own individualized list of next steps to take to improve their legal health. Lists usually include organizing personal papers, evaluating insurance policies, or executing important documents. Please note: the length of the workbook may vary slightly by state.

2. **THE ATTORNEY'S GUIDE**

The Attorney's Guide contains all the instructions the attorney will need to successfully conduct the seminar. In addition, the appendix contains sample visual aids and tips.

3. **THE COORDINATOR'S GUIDE FOR COOPERATIVE EXTENSION**

The Coordinator's Guide offers directions on how to promote the program, distribute the materials, and set up the seminar site.

4. **MARKETING SAMPLES**

Various methods can be used to promote the Legal Checkup. In the past, co-sponsors have done everything from putting up flyers to doing television spots. In addition, sample press releases and an introductory letter written by an Extension coordinator have been included in this guide. If you have suggestions about other Extension marketing tools that could be added to these materials, please forward them to Jane Margesson, LSN Senior Marketing Analyst at jmargesson@aarp.org.

5. **SELF-HELP GUIDES**

AARP has developed Self-Help Guides on a variety of issues such as joint accounts, and credit problems. Each Extension coordinator access to these materials on-line and is encouraged to distribute these to attendees at the seminar or provide them upon request after the program.

The self-help guides can be downloaded from the website above or camera-ready copies can be supplied from AARP's LSN office. These camera-ready copies can be duplicated by the attorney or the Extension office, based on mutual agreement by both parties. In the pilot county (Collier County, Florida), the Extension Educator had sample copies of the Self-Help Guides in a 3-ring binder available at the seminar. An order form was provided in the workbook for participants to make their selections of these additional materials. The order form also included charges to cover duplication and mailing out of the Guides by the Extension Office following the seminar.

6. ACCESSING THE MATERIALS

All materials are available on the Financial Security in Later Life Website at www.reeusda.gov/ecs/fsll/legal.htm

If you have any difficulty, please contact Jane H. Margesson, LSN Senior Marketing Analyst for assistance at jmargesson@aarp.org and the materials will be e-mailed or mailed to you.

Charging Fees for the Seminar

CONSIDERATIONS IN SETTING A FEE AND/OR DONATION.

Some of the seminar programs already conducted have been entirely free to the attendees. These included the early pilot programs as well as later programs conducted in areas where the attendees were primarily of low income.

Other seminar programs charged a fee of \$15 per attendee. Donations are also possible. Even if fees are charged, they may be waived for individual low-income attendees.

While non-AARP members can be charged a higher fee, AARP members may not be charged more than \$15. If an AARP couple (spouse or domestic partner) wants two workbooks, the cost of duplicating the additional workbook, usually around \$5.00, may be collected.

Seminar-associated costs (which you may need to partially cover through seminar fees) include:

- materials reproduction (see chart in Step #3)
- mailing or other publicity costs
- staff time to organize the session
- coffee or other refreshments
- supplies (box of pens, a flipchart and markers, if an overhead projector is not used, or transparencies, if one is used)
- equipment rental (overhead projector – can one be borrowed?)
- room costs, if any

Since attorneys are only responsible for conducting the actual seminar, not the other administrative duties, it is unlikely they will ask for a share of any fees collected.

Step #1:

Choosing the Time, Date and Location

Setting a time and date is usually the easiest part of the program. The only limitation is to allow enough time to develop and publicize the program. The time can vary widely, but it is usually at least six, and more likely, eight weeks from the date you set.

The length of each program can vary, but the seminars usually take approximately 2½ hours. We strongly recommend a short break. (See the general agenda in Step #5). The Americans with Disabilities Act requires public accommodations, as well as state or local government entities, to provide their services in an accessible site. Extension offices will almost certainly have a space suitable for seminars.

The room should:

- be capable of seating 10-30 people
- have chairs
- provide a solid writing surface for each attendee (a table is best)
- be arranged so participants can easily see one another (see room set up in Step #4)
- have excellent lighting
- accommodate a flipchart, overhead projector or computer for a power point presentation
- be accessible for persons with mobility impairments
- be close to accessible restrooms
- be available for ½ hour before and after the seminar
- be isolated from other activities and noise – (distractions or interruptions will interfere with the presentation and some participants may have hearing impairments)

You are fully responsible to make certain that the space provided meets all local fire and building code requirements. All Extension Offices should have appropriate liability insurance coverage and will normally have such arrangements in place for their regular activities.

WHO CAN I CONTACT FOR HELP?

The LSN Senior Marketing Analyst: Jane H. Margesson
AARP LSN
429 4th Avenue, Suite 1706
Pittsburgh, PA 15219
(800) 633-4496 x 115 (This number is for Extension use
ONLY – please do *NOT* give out to AARP members)
jmargesson@aarp.org

Individuals looking for information about AARP itself can call (800) 424-3410 or go online at www.aarp.org

Step #2: Setting Up the Checkup Program

1. WHAT TIMES ARE BEST FOR THE SEMINAR? HOW LONG TO THEY LAST?

Any date and time is fine as long as it is convenient for all parties involved. The seminars typically last approximately 2½ hours although some attorneys choose to stay for extra questions afterwards. If the members of the target audience are employed and therefore unavailable during the day, an evening or weekend program might be considered if possible.

2. HOW DO I MARKET THE PROGRAM?

Many advertising methods are effective, including newsletters, flyers, newspaper articles, television and radio spots, and direct mailing. Extension marketing samples used in the past are included in the Appendix, but the program may require some active recruitment.

It is essential to designate a staff person to follow-up with all inquiries promptly, send all materials out on time, and make certain that participants are pre-registered. The program will not sell itself, and requires an effort to make people realize what they can get out of it.

Note About Participants' Age.

The program is open to all persons **of any age**. They **DO NOT** have to be AARP members.

3. WHAT SHOULD THE PUBLICITY SAY?

You may want to create your own publicity based on your knowledge of your community. Use the sample flyer as a guide (*Appendix B*) and make any changes you want. We suggest you consider including the following two issues in your publicity.

Overcoming Attendee Barriers

Our experience has shown that many people are simply unaware of the legal precautions they should be adopting to protect themselves. Many more realize their importance, but just can't quite make the commitment to take the action necessary to prepare documents, gather information and organize papers together. Some people are wary of the cost of hiring a lawyer, and many just don't know a lawyer or how to find one.

Promote the Need for a Legal Checkup

For example:

Note the problems caused for the family due to failure to have medical directives, organized personal documents, etc.

Highlight the importance of autonomy, i.e., individual choices and appointing a surrogate of one's own choosing.

Mention the convenience and low cost of the Checkup.

Note that an attorney will be present to explain materials and answer questions.

4. WHAT IS EXTENSION'S RESPONSIBILITY FOR PUBLICITY?

- You are responsible for reproducing the materials.
- You are responsible for selecting the best methods to publicize the seminar to your target audience and distributing the flyers, press releases, radio ads, etc.

5. HOW CAN THE LEGAL SERVICES NETWORK STAFF HELP?

- Project staff can be available to answer any questions you might have and can offer solutions based on prior experience.
- Project staff can assist you in downloading the Participant's Workbook, Attorney's Guide, Coordinator's Guide and Self-Help Guides.
- Project staff can provide you with electronic versions of the AARP LSN logo for use in any of your publicity.

6. OTHER STEPS YOU CAN TAKE TO MAKE THE PROGRAM SUCCEED.

The Legal Checkup seminar needs people to attend in order to be successful. Many people will inquire about the program after seeing some publicity, but may hesitate to actually sign up to attend.

Steps you can take to make the program succeed:

- When inquiries are made, record the names and phone numbers and/or addresses.
- Assign someone to follow-up on these contacts. The staff or volunteer who is charged with the follow-up should be familiar with the Checkup program.
- Assist older persons who may have trouble getting to the seminar. Staff should be aware of local programs which might be able to assist elderly and/or physically handicapped persons who want to attend, but require transportation or other help.

Step#3: Signing Up Attendees

A well-organized sign-up process is key to the success of the seminar. The number of attendees must be monitored, important information must be given to those signing up, fees/donations must be collected, and a record of the names, addresses, and phone numbers of the attendees must be kept.

1. **SIGN-UP PROCESS and MAXIMUM NUMBER OF ATTENDEES**

Sign-up can be done in person, by phone, or by mail at your discretion. Some co-sponsors have successfully recruited attendees simply by handing out the enclosed flyer at other events being sponsored in their facility. The maximum number of attendees should be limited to about 25-30. If significantly more people are interested in attending, it is best to do two or more programs.

2. **WHAT DO I SEND TO INDIVIDUALS WHO HAVE SEEN AN ADVERTISEMENT BUT WANT MORE INFORMATION BEFORE REGISTERING?**

The first four pages of the Participant's Workbook, "Are You Legally Healthy," can be duplicated for those who want additional information.

3. **WHAT DO I SEND ONCE INDIVIDUALS HAVE REGISTERED?**

Every participant should receive the workbook and the personal plan approximately 4 weeks before the seminar. This will give them ample time to find missing documents, look up information, and begin filling out their personal plans.

4. **ARE PARTICIPANTS ALLOWED TO BRING FRIENDS OR FAMILY TO THE SEMINAR?**

Some attendees may wish to bring a guest, often the person who will help them attend to their affairs. Count on perhaps half of the group bringing someone with them. Plan accordingly for seating and refreshments.

5. **IF A FEE IS BEING CHARGED, DO BOTH THE HUSBAND AND WIFE HAVE TO PAY SEPARATELY?**

AARP members must not be charged more than \$15. The AARP membership structure entitles a member's spouse or domestic partner to the same benefits without having to pay for a second membership. Therefore, AARP members should be charged only one \$15 fee while attorneys may charge a second fee for non-members spouses.

One way to make a decision regarding separate payments is to see how many workbooks will be needed. Many couples share their investments, car payments, account information, etc. and one workbook will be sufficient. Others may have separate information, such as alimony or accounts from a previous marriage. They should then complete separate workbooks to avoid confusion. In this case, charging a second fee would be justified. AARP members should only be charged a second workbook fee of up to \$5.00.

6. COLLECTION OF FEES OR DONATIONS.

When should I collect the fee?

Experience shows it is best to collect fees or donations at the time of sign-up rather than at the door on the day of the Checkup program. It is easier to limit the number of those attending; there are likely to be fewer no-shows if payment has been made in advance; it is one less distraction for attendees and coordinator staff as attendees arrive for the program.

7. INFORMATION PROVIDED AT SIGN-UP.

As persons sign up to attend, a very important packet of information must be given to them. This can be done in person or by mail. If by mail, it is strongly suggested that follow-up phone calls be made to be certain that the information has been received. Attendee materials provided in advance include:

Workbook and Personal Plan

“Questions for the Lawyer” sheet (to be returned before the seminar)

It *will not* be beneficial for attendees to come to the program if they have not received and completed the Workbook.

The **Workbook** enables attendees to examine their personal information, locate missing documents, and discover some possible loopholes in their financial and health care planning. The success of the program relies a good deal on attendees receiving and using this information at least **30 days before the seminar**. Although the Checkup provides the opportunity for attendees to ask questions, it will not be possible for the attorney to advise on a personal level if it excludes other attendees.

However, with this in mind, we provide the attendees the opportunity to have their particular questions answered. At the end of the workbook is a form entitled “**Questions to the Lawyer.**” The attendees may indicate on this form the questions they would like to have answered at the program. The coordinator must collect these slips and make sure they reach the attorney at least **14 days before the seminar**. This is very important as it allows tailoring of the seminar to the group which will attend.

8. PRODUCING THE MATERIALS.

LSN makes available the sample materials for all phases of the program. Others do not need changes and are available in hard copy for you to reproduce. The box below gives an overview.

Materials	When Distributed?	No. Pages
Model Flyer/Press Release	5 – 8 weeks before	1
Cover Letter/Confirmation Letter sent with Workbook	4 weeks before	1
Legal Checkup Workbook	4 weeks before	75 May vary by state
“Questions to the Lawyer” Sheet	In the workbook	1
Personal Plan	In the workbook	1
Self-Help Guide List	In the workbook	1

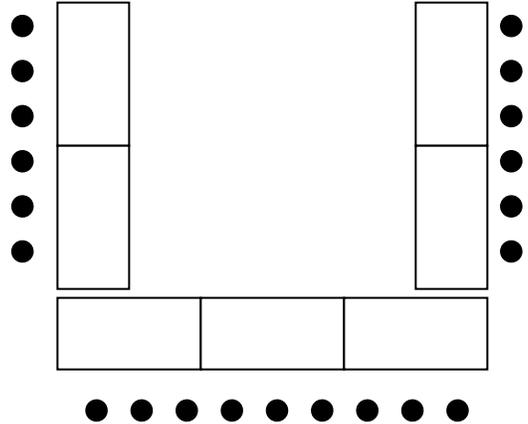
9. MISCELLANEOUS QUESTIONS LIKELY TO ARISE.

If questions arise which are not covered elsewhere in the materials, feel free to contact Jane Margesson, LSN Senior Marketing Analyst at jmargesson@aarp.org, (800) 633-4496.

Step #4: Last Minute Seminar Checklist

ROOM SET-UP

- _____ Is the room set-up ok?
 - _____ Eye contact among attendees?
 - _____ No noise or distractions?
 - _____ Tables or hard surface to write on?
- _____ extra table for refreshments/water
- _____ extra table for materials and registration, if needed



SUPPLIES

- _____ Box of pens or sharpened pencils
- _____ 4 black/blue heavy magic markers (plus 1 red marker)
- _____ transparency marking pen
- _____ extra transparencies
- _____ heavy paper to fold into name tents

EQUIPMENT

- _____ Flipchart easel or full pad of paper
- _____ Overhead projector (and screen, if needed)

Step #5: Presentation of the Legal Checkup Seminar

The attorney conducting the program will take charge of the actual Legal Checkup seminar. Your critical role is to support and coordinate the event and to assure a smooth-flowing program.

Legal Checkup Program Agenda

10 min	INTRODUCTION
	Welcome and explanation of the program
	Introduce attorney
	Explain the goals
	Walk through the agenda – solicit additional topics from the group
	Quiz (with the entire group)
60 min	DISCUSSION OF “CORE” TOPICS
20 min	BREAK
30 min	DISCUSSION OF TOPICS CHOSEN BY THE GROUP
15 min	CONCLUSION
	Final review of personal plan

1. LAST MINUTE SIGN-UPS OR WALK-INS.

This is not possible in this program. This particular project is entirely dependent upon the attendees getting their Workbook early and having time to prepare.

2. COMPLETION OF THE PARTICIPANT INFORMATION FORMS & NAME TENTS.

Greet the group as they begin to gather. Ask people to use the magic markers to put their preferred name on both sides of a table tent. This will assist the attorney to identify the participants.

3. DO THE PARTICIPANTS SHARE THEIR WORKBOOKS WITH EACH OTHER OR WITH THE ATTORNEY?

No, the workbooks are strictly confidential. However, if they so choose, participants may go over particular issues with the attorney or with others in the group, but they are not required to do so.

4. INTRODUCTION BY THE COORDINATOR.

To get started, you should call the group to attention. It is important to make certain everything is organized, i.e., attendees have the materials, a pen, etc. Preliminaries should be brief but it should be made clear who is sponsoring the program and if the attorney is NOT an LSN attorney, this should also be stated:

“The Legal Checkup seminar is one of many being held around the country. It will take 2-1/2 hours and we hope you will find it useful in planning for the future and avoiding legal problems. The program is co-sponsored by the AARP Legal Services Network and the xxx University Extension. The attorney conducting the program, NAME, is/is not a member of the Legal Services Network.”

You or the attorney **should review** the goals of the program and mention that they will leave with a written Personal Plan for the “**Next Steps**” they will need to take.

5. INTRODUCTION BY THE ATTORNEY.

If you have not already done so, the attorney will start an overview of the goals of the program and then will walk through the agenda. This may be a good place for people to introduce themselves as they raise additional items to be included on the agenda.

6. CONCLUSION – COMPLETION OF THE “PERSONAL PLAN”.

Stay within the time allowed and leave at least 15 minutes at the end for participants to amend their “Personal Plans.”

Attendees will have had a chance to review their Personal Plans during the seminar. Explain that it has been AARP’s experience that people are more likely to follow-up if they put together a “Next Steps” list. They should add anything they want to be reminded to do. Personal details are not necessary.

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Press Release - Sample 1

HAVE YOU HAD YOUR LEGAL CHECKUP?

We all know how important it is to have physical checkups, but have you had a “legal checkup” lately? If you’re not sure if you are “legally” fit, plan to participate in a unique legal program called the **Legal Checkup**.

Like a medical checkup, the Legal Checkup program helps you identify whether you are legally healthy or if you need to take action. Many legal “illnesses” lie hidden until they surface as a result of a crisis such as physical illness, injury or death. They can create very serious emotional and financial problems for you or your family. Unfortunately, very few people ever think of having a “Legal Health Checkup.” However, a comprehensive review of your legal affairs can expose those hidden problems and allow you to correct them before they erupt into a crisis.

Correcting your “legal health” problems is normally a relatively easy, inexpensive, and effective matter. You may be able to handle it yourself or you may wish to consult a lawyer, a financial planner, or other professional. The Legal Checkup process will help you to recognize a problem and decide how to solve or avoid the problem.

The program, sponsored locally by the _____ Extension, consists of two parts:

- 1) A confidential Workbook completed by you at home, and;
- 2) A Seminar conducted by attorney (Name) _____.

You bring your completed Workbook to the seminar. You need not share the information in your confidential Workbook with other participants or with the attorney. (Name of Attorney) _____ will give you general information about many areas of the law that affect you and answer questions about anything covered in the Workbook.

(Continued)

The Legal Checkup program will be hosted and held two times at (Location) _____:
(Time of Day, Date, Length of Seminar) _____ (example: in the afternoon of March 7, 1:30
p.m. to 4:00 p.m.), and (Time of Day, Date, Length of Seminar) _____. Participants can choose
the time best for them. There is a \$_____ charge per person to participate in the Legal Checkup
program. The fee includes the participant's 73-page Workbook that will be mailed in advance of the
seminar. The Workbook is particular to (Name of State) _____ residents.

As seminar size is limited, **pre-registration is required**. Call the _____ Extension
office at (Phone Number) _____ for a registration form that can be mailed or faxed.

#

*The Extension Service is an off-campus branch of the _____ (State Extension Headquarters).
Extension programs are open to all persons without regard to race, color, creed, sex, age, handicap, or
national origin. In compliance with ADA requirements, participants with special needs can be
reasonably accommodated by contacting the Extension Office at least 10 working days prior to the
meeting(s). We can be reached by phone at _____ or by fax at _____.*

Press Release - Sample 2

ARE YOU “LEGALLY HEALTHY”?

You may consider yourself to be in reasonably good physical health, but how would you gauge your “legal” health? If you are legally healthy, you should be able to answer “Yes” to all of the following questions.

- (1) Do you have all of your important personal documents and records on hand, either in a secure place, such as a desk, file cabinet or safe deposit box? (*birth, marriage, adoption, divorce, naturalization or immigration, military discharge papers, etc.*) .
- (2) Do you have basic legal documents which direct what happens to your assets when you die? (*such as a will or trust?*)
- (3) Do you have the basic legal documents to designate who will make personal decisions and handle your financial affairs in the event you are unable to do this for yourself? (*such as power of attorney and a health care power of attorney*) Do you have all of your financial records on hand, in some order, and up to date? (*tax returns, deeds, insurance policies, investment records, pension records, bank statements, etc.*) .
- (4) Do you know how each of your assets are titled and why this is a crucial issue?

(5) Are your insurance needs met to the extent practical?

(6) Are you comfortable that your investments are both safe and productive?

(7) Are you receiving all of the public or private benefits to which you are entitled?

(Social Security, Medicare, private pensions, etc.)

(8) Do you know which changes in your life will require a review of your “legal health” status?

(9) Do you have a resource, such as an attorney or accountant, in the event you require professional advice or assistance?

If you answered “No” to some of these statements, then you may want to consider a Legal Checkup. The _____ Extension is offering just such a program in (Month) _____. The Legal Checkup program will be hosted and held two times at (Location) _____: (Time of Day, Date, Length of Seminar) _____ (example: in the afternoon of March 7, 1:30 p.m. to 4:00 p.m.), and (Time of Day, Date, Length of Seminar) _____. Participants can choose the time best for them. There is a \$_____ charge per person to participate in the Legal Checkup program.

(Continued)

The fee includes the participant's 73-page Workbook that will be mailed in advance of the seminar. The Workbook is particular to (Name of State) _____ residents.

As seminar size is limited, **pre-registration is required**. Call the _____ Extension office at (Phone Number) _____ for a registration form that can be mailed or faxed.

###

The Extension Service is an off-campus branch of the _____ (State Extension Headquarters). Extension programs are open to all persons without regard to race, color, creed, sex, age, handicap, or national origin. In compliance with ADA requirements, participants with special needs can be reasonably accommodated by contacting the Extension Office at least 10 working days prior to the meeting(s). We can be reached by phone at _____ or by fax at _____.

Press Release - Sample 3

DO YOU HAVE ANY HIDDEN “LEGAL” ILLNESSES?

Everyone understands what physical health is all about. We are literally bombarded by information about the prevention of illness by dieting, exercising, and giving up smoking, for example.

In contrast, very few of us have a concept of “legal health,” even though it is a matter which affects us all. Just as there are a variety of potential hazards which can cause health problems, there are also a variety of potential hazards which can cause legal problems. Many people have no idea that they have a potential legal problem until it emerges in a moment of crisis. These legal “illnesses” lie hidden until they surface as a result of a crisis such as physical illness, injury or death. They can create very serious emotional and financial problems for you or your family.

That’s why a “Legal Health Checkup” is so important. A comprehensive review of your legal affairs can expose those hidden problems and allow you to correct them before they erupt into a crisis.

To help you become “legally healthy,” the _____ Extension is sponsoring the Legal Checkup Program. It consists of two parts:

- (1) A confidential Workbook completed by you at home, and;
- (2) A Seminar conducted by attorney (Name) _____.

You bring your completed Workbook to the seminar. You need not share the information in your confidential Workbook with other participants or with the attorney. (Name of Attorney) _____ will give you general information about many areas of the law that affect you and answer questions about anything covered in the Workbook.

(Continued)

The Legal Checkup program will be hosted and held two times at (Location) _____:
(Time of Day, Date, Length of Seminar) _____ (example: in the afternoon of March 7, 1:30
p.m. to 4:00 p.m.), and (Time of Day, Date, Length of Seminar) _____. Participants can choose
the time best for them. There is a \$_____ charge per person to participate in the Legal Checkup
program. The fee includes the participant's 73-page Workbook that will be mailed in advance of the
seminar. The Workbook is particular to (Name of State) _____ residents.

As seminar size is limited, **pre-registration is required**. Call the _____ Extension
office at (Phone Number) _____ for a registration form that can be mailed or faxed.

#

*The Extension Service is an off-campus branch of the _____ (State Extension Headquarters).
Extension programs are open to all persons without regard to race, color, creed, sex, age, handicap, or
national origin. In compliance with ADA requirements, participants with special needs can be
reasonably accommodated by contacting the Extension Office at least 10 working days prior to the
meeting(s). We can be reached by phone at _____ or by fax at _____.*

Press Release - Sample 4

ARE YOUR LEGAL AFFAIRS IN ORDER?

With the everyday stresses that we all cope with, sometimes it's hard to think ahead regarding the "What If...?" types of scenarios. But we usually find that the time invested "up front" can eliminate many headaches "down the road." Such is the matter of having your legal affairs in order. It can make difficult situations easier to cope with, for you as well as your loved ones.

Good legal "health" eliminates many of the most emotionally draining legal problems which commonly occur. Over and over again, these problems surface as a result of a crisis, often a sudden illness or a death. At the worst possible time it is discovered that no one has the authority to act for their stricken loved one, or no one can find important information required to apply for a needed benefit, or to begin helping a grieving widow or widower to settle the affairs of a deceased spouse.

To help you become "legally healthy," the _____ Extension is sponsoring the Legal Checkup Program. It consists of two parts:

- (1) A confidential Workbook completed by you at home, and;
- (2) A Seminar conducted by attorney (Name) _____.

You bring your completed Workbook to the seminar. You need not share the information in your confidential Workbook with other participants or with the attorney. (Name of Attorney) _____ will give you general information about many areas of the law that affect you and answer questions about anything covered in the Workbook.

(Continued)

The Legal Checkup program will be hosted and held two times at (Location) _____:
(Time of Day, Date, Length of Seminar) _____ (example: in the afternoon of March 7, 1:30
p.m. to 4:00 p.m.), and (Time of Day, Date, Length of Seminar) _____. Participants can choose
the time best for them. There is a \$_____ charge per person to participate in the Legal Checkup
program. The fee includes the participant's 73-page Workbook that will be mailed in advance of the
seminar. The Workbook is particular to (Name of State) _____ residents.

As seminar size is limited, **pre-registration is required**. Call the _____ Extension
office at (Phone Number) _____ for a registration form that can be mailed or faxed.

The combination of the workbook and the seminar will help you discover the things that need to
be done to correct potential legal problems and to be better prepared for the "What If's...."

#

*The Extension Service is an off-campus branch of the _____ (State Extension Headquarters).
Extension programs are open to all persons without regard to race, color, creed, sex, age, handicap, or
national origin. In compliance with ADA requirements, participants with special needs can be
reasonably accommodated by contacting the Extension Office at least 10 working days prior to the
meeting(s). We can be reached by phone at _____ or by fax at _____.*

Your Extension Masthead

DATE:

TO: Spiritual Leaders interested in the "legal" health of families

FROM: Name of Extension Educator, Title

_____ Extension/_____ (County)

RE: Information about a unique legal program — **"Legal Checkup Program"**

The _____ Extension is pleased to offer the "Legal Checkup Program." Like a medical checkup, the Legal Checkup program helps people identify whether they are legally healthy or if they need to take action. I would be grateful if you would notify your members of this opportunity by placing an announcement in your bulletin and perhaps posting the enclosed flyer. Additional flyers can be provided by giving me a call at _____ (phone number).

Below is a brief summary of the program that may be useful to your bulletin editor:

The "Legal Checkup Program" sponsored by the _____ Extension is being offered on _____ (date and time) and _____ (date and time) at _____ (location). Participants can choose the time best for them. Like a medical checkup, the legal checkup helps you identify whether you are legally healthy or if you need to take action. The cost is \$_____ (fee) per person -- it includes the seminar and a Workbook that is mailed in advance of the seminar. Since seminar size is limited, pre-registration is required. Call the Extension office at _____ (phone number) for registration information.

I very much appreciate your assistance and support of this important program. If you have any questions about the program, please call me, _____ (name of Extension Educator), at _____ (phone number).

Enclosure: flyer

Legal Checkup Program



Have You Had Your Legal Checkup?

We all know how important it is to have physical checkups, but have you had a *legal checkup* lately? If you're not sure if you are "legally" fit, plan to attend and participate in a unique legal program called the Legal Checkup.

Like a medical checkup, the Legal Checkup program helps you recognize whether you are legally healthy or if you need to take action. You may be able to handle it yourself or you may wish to consult a lawyer, a financial planner, or other professional. The Legal Checkup process will help you recognize a problem and decide how to solve or avoid the problem.

The Legal Checkup program has two parts:

a confidential Workbook completed by you at home

a Seminar conducted by ATTORNEY.

You bring your completed Workbook to the seminar. *You need not share the information in your confidential Workbook with other participants or with the attorney.* ATTORNEY will give you general information about many areas of the law that affect you and answer questions about anything covered in the Workbook.

(See The Other Side For REGISTRATION Information.)

COST: There is a \$10 charge per person to participate in the Legal Checkup program. The fee includes a participant's Workbook that will be mailed in advance of the seminar.

WHERE: The Legal Checkup program will be hosted and held two times at *The Glenview at Pelican Bay*, 100 Glenview Place in Naples. **Participants can choose the time best for them.**

☞ in the **afternoon** of March 7, 1:30 p.m. to 4:00 p.m.

☞ in the **evening** of March 8, 7:00 p.m. to 9:30 p.m.

REGISTRATION: As seminar size is limited, **pre-registration is required.** You will be registered when your check or money order (\$10 per person) is received. Registered persons will receive their Workbook by return mail. *The registration fee is not refundable once the Workbook has been mailed.*

SPONSORING ORGANIZATIONS: The **AARP Legal Services Network** is pleased to offer this program through the **University of Florida/Collier County Extension.** In addition, we are grateful to *The Glenview at Pelican Bay* for the meeting location and refreshments.



-----**CCLIP AND MAIL**-----

REGISTRATION FORM - LEGAL CHECKUP PROGRAM

Return to Jan Bennett, "Legal Checkup," 14700 Immokalee Road, Naples, Florida 34120. Registration deadline is February 28, 2001. **For further information, call the University of Florida Extension, Collier County Office, at 353-4244.**

NAME (Please Print): _____

NAME (Please Print): _____

ADDRESS: _____ DAYTIME PHONE: _____

City, State, Zip: _____

___ YES, I (we) am interested in participating in the **Legal Checkup Program.** Please register me (us) for the seminar. I have enclosed **\$10.00 check or money order for each person attending.** (Make checks payable to: **Overall Extension Council**). *The registration fee is not refundable once the Workbook has been mailed.*

I (we) will be attending the seminar at the following date and time – check (✓)one:

___ **March 7, 2001 from 1:30 p.m. to 4:00 p.m.** (Afternoon Seminar)

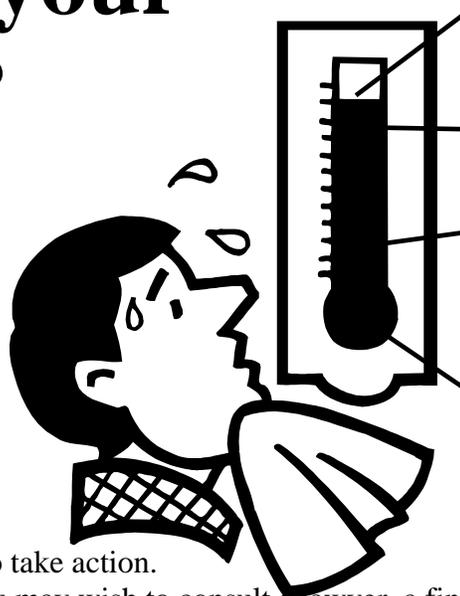
___ **March 8, 2001 from 7:00 p.m. to 9:30 p.m.** (Evening Seminar)

The Extension Service is an off-campus branch of the University of Florida and a department of the Public Services Division of Collier County Government. Extension programs are open to all persons without regard to race, color, creed, sex, age, handicap, or national origin. In compliance with ADA requirements, participants with special needs can be reasonably accommodated by contacting the Extension Service at least 10 working days prior to the meeting. We can be reached by phone at (941) 353-4244 or by fax at (941) 353-7127.

Have you had your legal checkup?

If you are ____ or over, you are invited to participate in a unique legal program sponsored by the _____.

This program is the **Legal Checkup**.



- Need a lawyer
- Need self - help
- Some action needed
- Affairs in order

Like a medical checkup, a Legal Checkup tells you if you are healthy, or if you need to take action.

you may be able to handle it yourself, or you may wish to consult a lawyer, a financial planner, or other professional. The Checkup will help you to recognize a problem and decide how to solve or avoid it.

The Legal Checkup program has two parts:

- a Workbook which is completed by you at home
- a Seminar or group session by an attorney in the AARP Legal Services Network.

You bring your completed Workbook to the group session. The lawyer will give you general information about many areas of the law that affect you. You can ask questions about anything in the Workbook.

There will be a _____ charge to participate in the Legal Checkup program. The most important benefit to you is preventing a legal problem in the future. Just as a medical checkup can help to keep you in good physical health, a Legal Checkup can keep you in good legal health.

Interested individuals will be selected on a first-come, first-served basis. If you want to be a part of this exciting new project, complete the form below, or call _____ at _____.

Yes, I am interested in participating in the Legal Checkup program.

Name: _____

Address: _____

Phone: _____ **Seminar Date:** _____

Location: _____

Cover Letter/Confirmation for Seminar Workbook

On Extension Masthead

Dear “Legal Checkup” Participant,

Hello! I am Jan Bennett, a Home Economist and Extension Educator with the University of Florida (UF) Extension, Collier County Office. A brochure about my organization is included in the front cover. UF Extension is pleased to partner with the AARP Legal Services Network to offer the “*Legal Checkup Program*.” The program consists of this comprehensive Workbook and a follow-up Seminar conducted by Mr. Alexander L. Kaplan, Attorney at Law, in Naples.

Additionally, I am grateful to *The Glenview at Pelican Bay* for hosting our Seminar.

You have been registered to attend the Legal Checkup Seminar at the following date and time checked _ below:

_____ **March 7, 2001 from 1:30 p.m. to 4:00 p.m.** (Afternoon Seminar)

_____ **March 8, 2001 from 7:00 p.m. to 9:30 p.m.** (Evening Seminar)

Registration (with light refreshments) will begin one-half hour before the start of the Seminar, so please allow yourself sufficient time for travel, registration, etc.

Directions to *The Glenview* (100 Glenview Place): This beautiful adult retirement facility is located west of Tamiami Trail (Rte. 41) in Pelican Bay. Turn west off of Rte. 41 onto Pelican Bay Blvd. The street, Glenview Place, is 6/10 of a mile from Rte. 41, on Pelican Bay Blvd. You will pass the Philharmonic Center for the Arts. After passing the Phil, you will come to a 3-way stop (West Blvd.). Continue on Pelican Bay Blvd. and Glenview Place will be the third street on the left-hand side. Turn left (or South) onto Glenview Place. *The Glenview* is 1/10th of a mile at the end of the street or cul-de-sac. We will be meeting in their multi-purpose room on the main floor.

To benefit the most from the Seminar, you will want to review and complete the portions of this Workbook that are important to your personal circumstances. Remember that you need not share this confidential Workbook with other participants or with the attorney.

(Continued on the back of this page)

Page 2

Cover Letter/Confirmation

The last page of this Workbook (page 74) is a form for addressing specific questions to Mr. Kaplan. Please return this sheet to me **1½ to two weeks** prior to the Seminar so that I might forward them to our attorney for his reply. Also, on page 64, is an order form for additional publications offered through AARP Legal Services Network and UF Extension. The fees listed cover the costs of duplication and postage.

You are to be congratulated for taking this important step toward improving your legal “health.” I look forward to seeing you at the Seminar.

Sincerely,

Jan Bennett, CFCS, M.S.
Extension Educator
Collier County

Enclosure: Workbook

Please Note: The University Extension Service does not endorse any attorney; collaboration with a private practice attorney in presenting the Legal Checkup Program is not endorsement.

LIST OF SEMINAR MATERIALS

All materials available at www.reeusda.gov/ecs/fsll/legal.htm

❑ LEGAL CHECKUP WORKBOOK

Personal Plan
 Questions to the Lawyer
 List of Self-Help Resources from LCE, Inc.
 List of Self-Help Guides from Legal Services Network

❑ COORDINATOR'S GUIDE for EXTENSION EDUCATORS

Sample Publicity for Extension
 Complete guide to setting up and running the program
 List of Seminar Materials

❑ ATTORNEY'S GUIDE

Presentation Outline
 Sample Transparencies for Seminar Presentation
 Dear Colleague Letter and enclosure

❑ SELF-HELP GUIDES FROM LEGAL SERVICES NETWORK

*** See page 6 "About the Materials" for tips on providing these guides to participants based on the Collier County Extension experience.**

CONSUMER:

A Credit Card is a Loan Card
A Mistake in Your Bill
Buying a Home
Having Problems with a Loan?
Health Insurance Portability & Accountability Act of 1996 (Group Plans)
Home Modification
How to Deal with Mail Order Problems
Selling a Home
What to do When You Can't Pay Debts
You Can Get Out of Home Improvement Contracts

FAMILY:

Financial Exploitation
The Older Couple and Divorce

ESTATES:

Financial Powers of Attorney
Personal Bank Accounts, What's Best for You?
Support for Widows and Widowers
What is a Will?

HEALTH CARE:

Hiring a Home Health Care Worker
Is a Life Care Contract for You?
Paying for Long-term Nursing Home Care

LANDLORD AND TENANT:

Renters, Know Your Security Deposit Facts

Post-Survey

Directions: Please help us evaluate the worth of the Legal Checkup Program (Workbook and Seminar) by answering the following questions:

IMPORTANT: Please base your responses on the **'COMBINATION' of the Workbook and the Seminar.**

As a result of the Legal Checkup Program:

- (1) Did you increase your knowledge (gain some useful ideas) that will strengthen your legal "health"? Yes _____ No _____
- (2) Thinking back over the material covered in the Workbook, have you started to put any of this information into practice? Yes _____ No _____
- (3) What changes **have you made** and/or what changes **do you plan to make** as a result of reading your Workbook and attending this Seminar? (Check _ all that apply)

- ___ Draft/revise my health care Power-of-Attorney and/or Health Care Surrogate Designation.
- ___ Draft/revise my living will.
- ___ Draft/revise my Durable Power-of-Attorney.
- ___ Draft/review my will and/or trust.
- ___ Change the names on my bank accounts or property.
- ___ Apply for some kind of benefits due to me and/or my family.
- ___ Write for copies of important documents.
- ___ Talk to my doctor/clergyman/lawyer about.....
- ___ Review my insurance policies.
- ___ Other: _____
- ___ Other: _____
- ___ Other: _____
- ___ Other: _____

- (4) One of the Program's objectives is to encourage individuals to make a detailed evaluation of the state of their own legal health. *As a result of your own "legal health" evaluation*, do you feel that you will benefit emotionally (i.e., peace of mind) and/or financially? Yes _____ No _____
- (5) Will you be sharing this information with others? Yes _____ No _____
- (6) Were you satisfied with the Legal Checkup Program (Workbook & Seminar)?
Yes _____ No _____

THANK YOU FOR COMPLETING THIS SURVEY!