

Planning for Longevity

Program: Longevity Planning Advisor Certification – 12-Pts to Understanding Longevity Readiness

MODULE 1 – Longevity Planning: Beyond Ageism

Explore internalized ageism and how this can affect our approach to aging and longevity planning; Introduce workshop sessions with interactive discussion; present lifeline review exercise Participants will be inspired to develop a personalized longevity plan by the end of 2014.



MODULE 2 – Exploring Values

Values: identify personal values, interests and strengths; clarify priorities for planning
Participants will recognize their current strengths/passions/values and how these may change as we age.

MODULE 3 – Financial Concerns in Planning

Finances: planning ahead; beliefs about money; how much is enough; strategies for living on what you have; insurance possibilities (ex. annuities, long term care); estate planning
Participants will gain an overview to help guide and carry out their own research, explore how to prioritize their own needs, and how to start the financial conversation with family members.

MODULE 4 – Relationships: Interdependence and Change

Relationships: moving from independence to interdependence; managing change and loss; intergenerational possibilities; expanding social connections (in-person & social media)
Participants will understand the dynamics of changing relationships as we age and be able to adjust to what is, while also creating new relationship possibilities.

MODULE 5 – Self Care and Balance

Balance/Self care: work, play, socializing and learning; care-giving and care-receiving
Participants will identify areas of interest to create personal balance, identify steps in the caregiving process and learn how to use support systems and resources to enhance quality of life and relationships

MODULE 6 – Housing and Living Arrangements

Housing: reviews traditional housing solutions as we age, as well as identifies new opportunities – existing and to-be-created
Participants will explore a personal meaning of home and learn about traditional and non-traditional approaches to housing.

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MODULE 7 – Aging Well: Exploring Resources for Well-Being

Well-being: physical, mental, and emotional aspects

Participants will identify existing inner resources and potential saboteurs and develop steps to optimize their vision of aging.

MODULE 8 – Work and Volunteerism

Work & Volunteerism: benefits and drawbacks of each; opportunities for employment at 50+; volunteer prospects

Participants will gain an overview and share ideas on how to research opportunities that match their needs, skills, and interests.

MODULE 9 – Legal Issues: Empowering Choices

Legalities and End of Life: legal aspects of aging; hospice and palliative care; ensuring you are in charge of your end-of-life decisions; working with parents before a crisis

Participants will gain a working knowledge of the types of legal documents needed as we age, gain understanding of the many choices surrounding end-of-life, prepare to begin making choices for themselves, and learn how to open the discussion with older family members.

MODULE 10 – Meaning, Purpose and Legacy

Meaning, Purpose & Legacy: ethical wills; understanding the creative process, and how to effectively redirect oneself

Participants will explore meaning in their lives, values they want to pass on, and the role creativity and redirection have in the later years.

MODULE 11 – Spiritual Living

Individuation, Solitude, Passion, Gerotranscendence, Spirituality

Participants will explore their passions, learn about the developmental tasks of older adulthood, and identify personal sources of spirituality.

MODULE 12 – Your Personal Longevity Plan: Review and Next Steps

Bringing it all together; where do we go from here?

Participants review the changes they have made over the course of 12 workshops and identify where they want to do further work, how they will do this, and with whom.