

SITUATION:

Management of finances, death, and distribution of assets are issues every family and individual in Wyoming faces. The details are unfamiliar and overwhelming for many who are reluctant to face the emotional and legal stresses required to be adequately prepared. The Financial Literacy Issue Team of the community development initiative determined there were no public documents written specifically considering Wyoming statutes and end-of-life issues, property distribution, probate, and many other estate requirements. Although some general online, self-help materials and forms can be found, none are written specifically with the Wyoming resident in mind.

The financial literacy team determined that, because of the number of communities, the distance between tours made traditional face-to-face extension program delivery impossible. The team's efforts to create online financial literacy materials brought a request for extension to participate in a Jackson seminar planned for Women in Transition.

Funds from an internal UW Extension grant and a partnership with Long, Reimer, Winegar, Beppler, LLP law firm with offices in Wyoming, Colorado, and Utah to assist in writing

estate planning documents addressing Wyoming laws, created a series of bulletins (*Planning Ahead, Difficult Decisions*) about end-of-life issues. The law firm assigned Aaron Lyttle, one of its associate experts in estate law, to the project.

The topics of the *Planning Ahead, Difficult Decisions* bulletins served to frame the financial literacy component of a workshop developed for the Women in Transition seminar, which reached 81 participants. Evaluations from the seminar prompted a request from the Senior Center of Jackson Hole to host the workshop. A series was created working collaboratively with Beck Zaist, director of the Senior Center, entitled Putting Your Affairs in Order. The success of the series in Jackson brought requests from area senior centers for the program. The series was offered in collaboration with five senior centers in the West Area (Lincoln, Sublette, Sweetwater, Teton, Uinta counties). Kelly Blue, attorney at law, co-presented in the Kemmerer series.

The Putting Your Affairs in Order curriculum expanded program content developed by the financial literacy issue team for its webinar presentations and created three face-to-face workshops: Who Gets My Good Stuff; So Now You're The Executor; and Putting the Important Papers Together. The



PUTTING YOUR

workshop series was offered in Jackson, Big Piney, Pinedale, twice in Thayne, and Kemmerer by the respective communities' senior centers. Two hundred and seven participated in the Putting Your Affairs in Order series. There are additional workshop series scheduled in the West Area for the coming program year.

IMPACTS:

A sample follow-up survey revealed 21 percent of participants had a plan for dispersing non-titled property prior to the class. Fifty-eight percent had begun to create a list for dispersing their properties. The comment that was offered repeatedly, "I have a plan for how to talk with my children now," substantiated the classes' objective to assist with determining a plan, goals, and what's fair in one's distribution process. Less than 10 percent of the respondents indicated they understood the responsibilities of an executor prior to the session. Evaluations revealed that all participants better understood the role and responsibility of an executor. After the Taking Care of My Important Papers session, participants were asked, "In response to the question prior to this session I had my important papers organized, and 90 percent of respondents indicated "No"; 3

percent indicated "kind of." After the session, participants indicated they were going to make working on the important papers part of their routine paper handling strategy.

Individuals who are approaching their senior years were equipped with information to use in putting their affairs in order. Attendance grew each week at every community. Participants encouraged others in the community to join the upcoming class. The Putting Your Affairs in Order workshop series provided information, resources, and strategies on where to begin an overwhelming task. The series served as a reassurance for some they have things moving in the direction they desired and affirmed they were addressing their goals. The series served to make the difficult topic of what will happen upon one's death easier to address.

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AFFAIRS IN ORDER series
provides guidance to seniors