



Reviews by Forum Attendees

Thought Forum was Comprehensive

- Covered all areas of concern.
- Relevant subjects were well covered.
- A lot of the questions that I have are very specific based on my care of an elderly parent.
- You covered the essential information. Right on target; all that I needed to know.

Quality of Panel

- Great panel; keep (these events) coming.
- I would benefit from attending this forum again. Very impressive panel.
- Great group, great topics.

Quality of Program

- Excellent!
- Thanks so much! This was a Saturday well spent! Working all week, this was my day for running errands, etc. This seminar was a much better choice!!
- The method of presentation took all of the fear and apprehension away. Very informative. The most comprehensive variety of financial information I have gotten in one setting. The emphasis on "communication" is key even with subjects we are reluctant to discuss.
- Questions that I did not even know to ask were answered!
- The video and correlated speakers were very, very helpful in tying everything together.
- This was an excellent conference!
- Very informative, I was able to really understand the pros and cons of a reverse mortgage.
- I like the Biblical associations made regarding the planning that is involved in building and maintaining the God's Kingdom.
- Showing the video enhanced the reality of where everyone is. It served to raise the personal urgency of financial planning with experts.
- Thank you!
- All of this was so informative.
- This was invaluable information.
- Thank you all for your time and providing this resource. I am extremely grateful to all of you for sharing your knowledge.
- Break out sessions with Questions & Answers were very helpful.
- All of this information is important, as I am planning for myself as well as trying to help my mom; this is so important and needed. Thank you for everything.
- Bible-based, quality information, well presented.
- All of the session as very informative.



Survey Results
Single Woman Estate Planning Seminar
January 25, 2025

1) What was the most important information that you learned today?

The 5 documents that need to be ready when you pass away:

- Health care proxy
- HIPPA authorization form
- Living will
- Will
- Durable power of attorney

Age 75

- Health care proxy
- HIPPA authorization letter
- Health care agent
- What is needed regardless of what happens to me, is to make sure that my wishes are honored.

Age 61

Having the essential documents in place

- Healthcare proxy
- Power of attorney
- Living will
- HIPPA authorization letter

Age 62

- The lists of all the documents needed for the three major legal categories: life, disability and death.

Age 80++

- The most important information that you must write down—everything from your remains to personal property.
- Power of attorney vs. executors

Age 22

- Learning the 5 documents I need to make my potential disability and death easier for my family to deal with.

Age 72

- That you do not have to leave a list of passwords for the one who is responsible.
- That a power of attorney is very important to have. Also you need someone to make medical decisions for you.
- Different documents needed to take care of business.

Age 42

- I learned about the three domains in my tool box that I need in order to be legally prepared for disability and death which include medical, legal and financial domains.

more on next page...



2) What topic(s) would you like to learn more about?

- Revocable trust
- Investments

Age 75 – Life insurance

Age 61 – trusts – revocable and irrevocable

Age 62 - see examples of POA, HIPPA form, Trust, Will documents at the seminar

Age 80++ - how to obtain money in a deceased bank account when you are next of kin. Debt left behind by loved ones.

Age 42 – I would like to learn more about estate planning and establishment and a trust.

3) You could have been doing other things this morning; was the session worth your time? Why or why not?

I am very glad I came today. I was thinking that I really do not have any assets that I needed to name somebody to oversee. But through the seminar my eyes were opened that I have more than I thought I had.

Age 75— Yes. I really thought that I would not benefit from this seminar since I do not have an estate. But I learned a lot of information today.

Age 61- I need to be able to get my affairs in order before I continue my health journey.

Age 22- Yes, it was worth my time. Starting a career and out of college, I can plan my own finances and future. That information can be incorporated into conversations that I can share with my parents.

Age 72- Yes, very much worth my time because as one who thought I knew it all from going through planning for the inevitable Yes, it is worth my time. Very educational. Yes, this is something that I have been thinking about. This can help me and my family hold the conversation that we need to have.

Age 42- This session was definitely worth my time. I was able to gain knowledge to empower me make better decisions concerning preparation in case & disability and /or planning for the unexpected in life.

4) Would you recommend that other single women attend this kind of seminar?

Absolutely

Age 61 – Absolutely. I think that young singles and chosen need to be educated about why these seminars will benefit them. For example, these are legal documents needed starting at age 18. I did not think of this.

Yes if they do not have a will and other aspects of end of life preparation.

Age 22 - yes

Age 72 – definitely!

Yes. I would like to learn more about estate planning and establishment and a trust.