

**Horizon Estate Planning Services
Introduction to End of Life Planning**

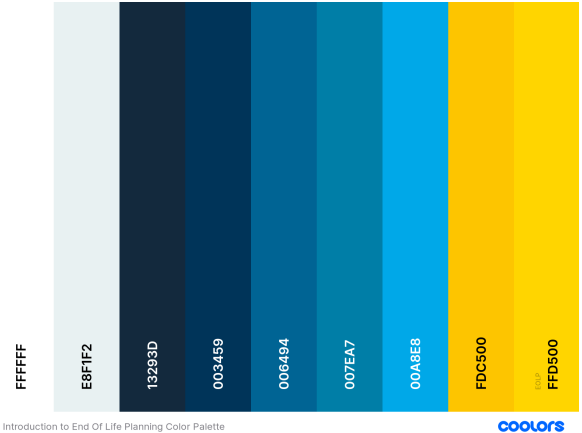
Course Overview

Target Audience	Seat Time	Module Resources/References
Prospective Horizon Estate Services clients, especially those new to the End of Life Planning process	30 minutes	
Learning Objectives	Training Outline	
1. Identify the features and functions of a Last Will & Testament 2. Describe how physical, financial, and digital assets are managed differently before and after your death 3. Recognize how Powers of Attorney documents and Advance Healthcare Directives protect your medical and financial wishes 4. Identify best practices for storing and sharing your End of Life Plans with loved ones.	1. Welcome 2. Navigation Assistant 3. Course Introduction & Learning Objectives 4. What is End of Life Planning? 5. Purpose & features of the Last Will & Testament 6. Managing Probate vs. Non-Probate Assets 7. Knowledge Check 8. Medical & Financial Powers of Attorney 9. Advance Healthcare Directives 10. Knowledge Check 11. Storing & Sharing Your End of Life Plans 12. Course Summary 13. Course Quiz 14. Personalized End of Life Planning Checklist 15. Course Conclusion	

Directions:

- Leave feedback by highlighting the specific text/ item you would like changed and leaving a comment describing the change (CTRL+M)
- General questions or feedback not relating to a specific item on the slide can be left in the Notes section of each slide. Please include your initials and the date when leaving feedback in Notes to allow for follow-up as needed.

Visual Design Overview

Module Color Palette	Key Images, Logos, etc.	Slide Design Notes/ Prototype(s)
 Introduction to End Of Life Planning Color Palette COOLERS	Horizon Logo:  The course is narrated by Arthur, who speaks primarily from a comfortable living room space. 	Bold, simple graphic design. Content and images contained within blocks in varying configurations (broad examples below). All slide titles in bold white font against black rectangular title bar (unless otherwise noted).  The Horizon logo is located in the upper right corner of each slide, within the black title bar.
Fonts	Animations	General Development Notes
Slide Text: Franklin Gothic Book Slide Titles: Franklin Gothic Heavy Heading font: Franklin Gothic Heavy Body font: Franklin Gothic Book Sample Heading Body text body text body text. Body text body text	Speech callouts appear timed with audio, with no entry/exit animation. Unless otherwise noted, all other slide text, objects, and images fade in over 1.0 seconds, timed with audio.	Course utilizes Modern Player Content in brackets[] indicate notes for the developer and will not appear on the slide All directions text should appear in italics.

Detailed Module Outline

Slide [1.1]/ Menu Title: [Welcome]			
Audio	Slide Text	Visual Design	Development
[1] Welcome to the Horizon Estate Planning Services Introduction to End of Life Planning course. [2] Click the yellow button to learn how to navigate the course. [3] Click the blue button to begin.	[Slide Title] Welcome [Course Title] [1] Introduction to End of Life Planning [Buttons] [2] NAVIGATION [3] BEGIN [Directions] [2] Click to learn how to navigate the course. [3] Click to BEGIN.	Black rectangular border at top of slide contains slide title in white. Slide is divided into 4 unequal rectangles by solid black lines 10 pixels wide. [1] Course title appears in upper left rectangle in black font against white background. Horizon logo appears against a white background in lower right rectangle. [2-3] Yellow NAVIGATION button and blue BEGIN button appear to the right of the logo, with directions underneath. Remaining two rectangles contain pictures of couples of varying ages/backgrounds. Ex:  	Course title, Horizon logo, and photos are visible on slide when timeline begins. Buttons and directions fade in with audio. The Resources tab should not be visible on this slide. The Next button is disabled on this slide. NAVIGATION button jumps to Slide 1.2. BEGIN button jumps to Slide 1.3.
Notes:			

Slide [1.2]/ Menu Title: [Navigation Assistant]			
Audio	Slide Text	Visual Design	Development
[1] To move through this course, you'll use the navigation buttons located around the edges of your screen. [2] The Previous and Next buttons allow you to move forward or backwards one slide at a time. At the end of each slide, you'll use the Next button to proceed to the following slide. [3] You can see all of the slides in the course on the Course Menu, located on the left side of your screen. Click any of the slide titles to go directly to that slide. [4] You can use the Seekbar controls to pause or replay a slide. [5] To adjust the volume or settings of the player, use the buttons to the left of the previous button. [6] Finally, click Resources in the upper right corner of your screen to visit the Resources page once you have completed the course. [7] To exit the Navigation Assistant and begin the course, click the Next button	[Slide Title] Navigation Assistant [Callout Labels] [2] Previous/Next [3] Course Menu [4] Replay [4] Play/Pause [5] Player Settings [6] Resources	Background is a comfortable living room setting, made partially transparent to create visual contrast with the callouts. Rectangular callout shapes with labels point to player features. They are yellow, partially transparent, with black text.	[7] All callouts except Previous/Next fade out. The Next button advances the learner to the next slide.
Notes:			

Slide [1.3]/ Menu Title: [Introduction]			
Audio	Slide Text	Visual Design	Development
[1] Hello, and welcome! My name is Arthur, and I'm here to help you begin the End of Life Planning Process. [2] Please write your name in the blue box below so that we can get to know each other a little better. Then click SUBMIT.	[Slide Title] Course Introduction [Arthur Callouts] [1] Hello, and welcome! My name is Arthur, and I'm here to help you begin the End of Life Planning Process. [2] Please write your name in the blue box below so that we can get to know each other a little better. Then click SUBMIT. [Buttons] SUBMIT	Background is the comfortable living room. Arthur appears on the left of the screen, standing in front of the table, arms at his side. He is smiling. Callouts appear to Arthur's right. Blue text entry box appears to the right of Arthur, in the lower third of the screen, with the blue SUBMIT button underneath.	[2] Arthur gestures to the left as the text entry box and SUBMIT button fade in. SUBMIT opens layer 1.3a
Notes:			

Layer [1.3a]			
Audio	Slide Text	Visual Design	Development
[1] Nice to meet you. Thanks for joining me today. [2] I'm here to introduce you to the important decisions that you'll need to make, and the documents you'll need to prepare, to ensure that your affairs are in order before you pass away. [3] By the end of our time together, you'll be able to... [4] Identify the features and functions of a Last Will & Testament [5] Describe how physical, financial, and digital assets are managed differently before and after your death [6] Recognize how Powers of Attorney documents and Advance Healthcare Directives protect your medical and financial wishes and	[Slide Title] Course Introduction [Arthur Callouts] [1] Nice to meet you [Learner Name]. Thanks for joining me today. [2] I'm here to introduce you to the important decisions that you'll need to make, and the documents you'll need to prepare, to ensure that your affairs are in order before you pass away. [3] By the end of our time together, you'll be able to... [Learning Objectives] [4] Identify the features and functions of a Last Will & Testament [5] Describe how physical, financial, and digital assets are managed differently before and after your death [6] Recognize how Powers of Attorney documents and Advance Healthcare Directives protect your medical and financial wishes	Same layout/ background as base layer, Arthur in same location. Arthur has two states - Talking and Gesturing to the right. Callouts appear to the right of Arthur. A white rectangle occupies most of the remainder of the slide, with each LO written in white within a teal blue rectangle.	[1] Arthur begins the slide in a talking state. [3] Callout bubble fades, the white rectangle appears and Arthur changes to gesturing. [4-7] Learning objectives fade in with audio Slide auto-advances to 1.4 when timeline ends on this layer.

<i>[7] Identify best practices for storing and sharing your End of Life Plans with loved ones.</i>	[7] Identify best practices for storing and sharing your End of Life Plans with loved ones.		
Notes:			

Slide [1.4]/ Menu Title: [What is End of Life Planning?]			
Audio	Slide Text	Visual Design	Development
<i>[1] I know it can be difficult to think and talk about, but [2] planning ahead for when you pass away is the best way to prepare and protect you and your loved ones.</i> <i>[3] By taking the time now to make tough decisions and prepare a few essential legal documents, you can [4] ensure that your medical and financial wishes are followed, and [5] that your loved ones are cared for after your death, and not left with a [6] substantial administrative or financial burden on top of their grief.</i>	[Slide Title] What is End of Life Planning? [Arthur Callout] [1] I know it can be difficult to think and talk about, but planning ahead for when you pass away is the best way to prepare and protect you and your loved ones. [Text in white rectangle] [2] Planning ahead for when you pass away is the best way to prepare and protect you and your loved ones. [Arthur Callouts] [3] By taking the time now to make tough decisions and prepare a few essential legal documents, you can ensure that your medical and financial wishes are followed, and that your loved ones are cared for after your death, and not left with a substantial administrative or financial burden on top of their grief. [Text in blue rectangle] [4] Ensure your medical and financial wishes are followed [Text in teal rectangle] [5] Provide for your loved ones [Text in yellow rectangle] [6] Avoid administrative and financial burdens	Left half of slide is Arthur in living room, in talking position. Callouts appear to the right, within his half of the slide. Right half of slide is divided. Top half is single white rectangle and contains an image of a large family along with the text. Ex:  Bottom half is divided equally into 3 rectangles - dark blue, teal blue, and yellow. Text in rectangles appears in white, centered within each rectangle.	[2] Text in white rectangle fades in, above a picture of a large family. The Next button is disabled on this base layer layer. Slide jumps to layer 1.4a when timeline ends.
Notes:			

Layer [1.4a]			
Audio	Slide Text	Visual Design	Development
[1] I'm here to help you. Together, we'll discuss 4 documents that you can prepare now to ensure that your affairs are in order for the future. [2] We'll review how to prepare a Last Will & Testament. [3] How to name beneficiaries who will receive your assets upon your death. [4] How to identify medical and financial powers of attorney. and [5] How to create an Advance Healthcare Directive [6] We'll also talk about how you can store this information and share it with your loved ones. [7] Click the box to learn more about the many functions of a Last Will & Testament.	[Slide Title] What is End of Life Planning? [Arthur Callout] [1] I'm here to help you. Together, we'll discuss 4 documents that you can prepare now to ensure that your affairs are in order for the future. [Rectangle Labels] [2] Last Will & Testament [3] Naming of Beneficiaries [4] Powers of Attorney [5] Advance Healthcare Directive [Arthur Callout] [6] We'll also talk about how you can store this information and share it with your loved ones. [7] Click the box to learn more about the many functions of a Last Will & Testament.	Left side of slide is identical to base layer. Right side of slide is one large white rectangle. Four yellow rectangles are stacked vertically within, each with a pen icon but otherwise empty.  Each yellow rectangle has three states: Normal (yellow box with pen icon) REVEAL (yellow with pen icon and rectangle title) CLICK TO CONTINUE (teal box with pen icon and rectangle title)	Arthur begins in a talking position. [2] Callout bubble fades and Arthur gestures to the right. [2-5] Titles appear in each yellow rectangle, all timed with audio. No fade in. [6] Callout bubble returns. [7] All rectangle titles except Last Will & Testament disappear, and that rectangle turns teal blue. Next button is disabled on this slide. Blue Last Will & Testament rectangle jumps to 1.5
Notes:			

Slide [1.5]/ Menu Title: <i>[Last Will & Testament]</i>			Objective: [1]
Audio	Slide Text	Visual Design	Development
<i>[1] A Last Will & Testament, or will, is a legally binding document that dictates how your assets will be distributed after you pass away.</i> <i>[2] Click each tab below to learn more about the different functions of a will.</i>	[Slide Title] Last Will & Testament [Slide text] [1] A Last Will & Testament, or will, is a legally binding document that dictates how your assets will be distributed after you pass away. [Directions] <i>[2] Click each tab below to learn more about the different functions of a will.</i> [Tab titles] Beneficiaries Executor Distribution of Assets Digital Assets Guardianship Pet Care	White background. The slide text is centered below the title, with the directions text in blue just below it. The bulk of this slide is occupied by an accordion interaction, with six tabs in varying palette colors located along the left third of the slide. Each tab is titled in white, with a corresponding icon located at the top. Most of the remaining space to the right is taken up by an image of a legal document labeled Last Will & Testament. This image will be replaced by the content of each tab as it opens.	The next button is disabled on the base layer and all slide layers until all tabs/layers of the accordion have been visited.
Notes:			

Layer [1.5a]			Objective: [1]
Audio	Slide Text	Visual Design	Development
[1] The primary function of your will is to name beneficiaries. These are the people or organizations that you want to receive your assets after you pass away. [2] Your beneficiaries could include your spouse, children or grandchildren, other loved ones, and even organizations such as charities that you wish to support. You can divide your assets up as you see fit among all of your beneficiaries. [3] If you want specific assets to go to specific individuals upon your death, it is essential to include them in your will. Any assets that do not have a specifically named beneficiary become part of what is called your residual estate. In most cases, assets in the residual estate would go to your surviving spouse, or children to distribute as they see fit.	[Slide Title] Beneficiaries [Slide text] [1] The primary function of your will is to name beneficiaries. These are the people or organizations that you want to receive your assets after you pass away. [3] If you want specific assets to go to specific individuals upon your death, it is essential to include them in your will.	The slide title appears at the top of the open accordion tab. The slide text appears underneath the title. Centered between the text are four images, corresponding to the suggested beneficiaries (spouse, children, loved ones, organizations). Examples:  	[2] Images fade in one at a time, each timed to corresponding audio.
Notes:			

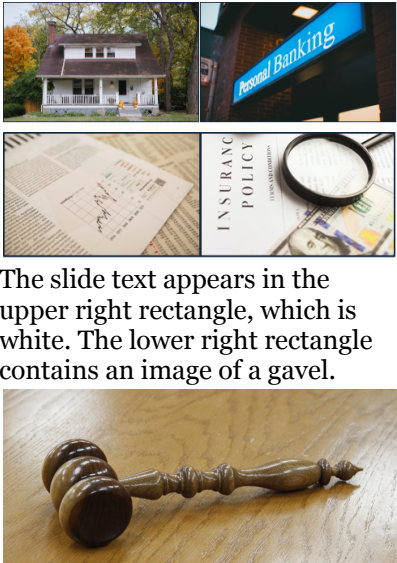
Layer [1.5b]			Objective: [1]
Audio	Slide Text	Visual Design	Development
[1] You will use your will to name an executor. This is the person who is responsible for following the instructions in your will, and distributing your assets to your beneficiaries. [2] You might choose to name an adult relative, your lawyer, or even a close family friend as your executor. [3] Whoever you choose, make sure you notify the person and discuss your decision with them. If you do not appoint an executor in your will, a court will name one after your death, but this can severely delay the distribution of your assets.	[Slide Title] Executor [Slide text] [1] You will use your will to name an executor. This is the person who is responsible for following the instructions in your will, and distributing your assets to your beneficiaries. [3] Whoever you choose, make sure you notify the person and discuss your decision with them.	Similar layout to 1.5a, with three images centered between text blocks. [2] Images suggest possible executors (adult relative, lawyer, close family friend) Examples: 	[2] Images fade in one at a time, each timed to corresponding audio.
Notes:			

Layer [1.5c]			Objective: [1]
Audio	Slide Text	Visual Design	Development
[1] All of your possessions are considered assets. [2] This includes physical assets, such as properties, vehicles, jewelry, or other family heirlooms. [3] It also includes financial assets, such as bank accounts or investment accounts. [4] Beneficiaries are named differently, depending on the type of asset. We'll discuss this more, shortly.	[Slide Title] Distribution of Assets [Slide text] [1] All of your possessions are considered assets. This includes: [2] Physical Assets [3] Financial Assets [4] Beneficiaries are named differently, depending on the type of asset.	The slide title appears at the top of the open accordion tab. The slide text appears underneath the title. [2-3] The subheadings Physical Assets and Financial Assets appear on the left side of the open accordion tab, with images aligned to their right that correspond to the types of assets mentioned (house, car, bank accounts, etc.)	[2-3] Images fade in one at a time, each timed to corresponding audio.
Notes:			

Layer [1.5d]			Objective: [1]
Audio	Slide Text	Visual Design	Development
[1] Your will also allows you to make preparations for managing or closing any online accounts after you die. [2] This includes financial accounts with banks or credit card institutions, as well as social media, online shopping, email, and other types of online accounts. [3] The average person under 70 has nearly 200 digital accounts, which can be challenging to manage after your death. [4] The best way to prepare your online accounts is to use a password manager to keep track of all of your logins and passwords. [5] You should also name a digital executor in your will to manage and shut down your online accounts after your death. It is a good idea to share access to the password manager with this person. [6] We'll talk more later in the course about how best to share information like this with your loved ones.	[Slide Title] Digital Assets [Slide Text] [1] Your will also allows you to make preparations for managing or closing any online accounts after you die. • [4] Use a password manager • [5] Name a digital executor	The slide title appears at the top of the open accordion tab. The slide text appears underneath the title. Directly underneath the slide text are four images, arranged in a square, corresponding to the types of digital assets (credit cards, social media, online shopping, email). 	[2] Images fade in one at a time, each timed to corresponding audio.
Notes:			

Layer [1.5e]			Objective: [1]
Audio	Slide Text	Visual Design	Development
<i>[1] If you have minor children, your will should name a guardian or co-guardians to care for them in the event of your death.</i> <i>[2] You may also decide to use your will to establish a financial trust that can be accessed by the guardian you name, or by your children when they reach a certain age.</i> <i>[3] You can also include wishes for how your children are raised, such as the type of school they attend.</i> <i>[4] Or name a secondary guardian to care for them if the primary guardian is no longer able to.</i> <i>[5] Be sure to discuss your plans and wishes ahead of time with the person or people you select as guardians, to ensure that they are willing and able to carry out your wishes.</i>	[Slide Title] Guardianship [Slide Text] [1] If you have minor children, your will should name a guardian to care for them in the event of your death. You may also decide to: • [2] Establish a financial trust • [3] Document your wishes for how your children are raised • [4] Name a secondary guardian [5] Be sure to discuss your plans and wishes with the person or people you select as guardians.	The slide title appears at the top of the open accordion tab. The slide text appears underneath the title. Also included in the open tab is an image of a parent with a child. Ex: 	[1] Image fades in with text
Notes:			

Layer [1.5f]			Objective: [1]
Audio	Slide Text	Visual Design	Development
[1] If you have pets, you may choose to include details about how you would like your pets cared for after your death. [2] You can use your will to identify the person or people that you would like to take charge of your pets, [3] and set up a pet trust to manage and fund the care of your pets. [4] This is a good idea if you have a pet with a long life span, such as a parrot or horse, or a pet that requires expensive care.	[Slide Title] Pet Care [Slide Text] [1] If you have pets, you may choose to include details about how you would like your pets cared for after your death. You can use your will to: • [2] Identify the person or people that you would like to take charge of your pets • [3] Set up a pet trust to manage and fund the care of your pets.	The slide title appears at the top of the open accordion tab. The slide text appears underneath the title. Also included in the open tab is an image of a person and their pet. Ex: 	[1] Image fades in with text
Notes:			

Slide [1.6]/ Menu Title: <i>[Probate vs. Non-Probate Assets]</i>		Objective: [1, 2]	
Audio	Slide Text	Visual Design	Development
<i>[1] Different assets are managed differently after your death. [2] Certain assets are considered probate assets, which means they must go through a probate process, or legal process, before they can be distributed. [3] Non-probate assets can be distributed directly to your beneficiaries, without having to go through the probate process. [4] Click each box to learn more about the difference between probate and non-probate assets, and how to ensure that each type of asset is correctly distributed to your beneficiaries.</i>	[SlideTitle] Probate vs. Non-Probate Assets [Slide Text] [1] Different assets are managed differently after your death. • [2] Certain assets must go through the probate process, or legal process, before being distributed. • [3] Others can be distributed directly to your beneficiaries. [Rectangle Labels] [2] Probate Assets [3] Non-Probate Assets [Directions] [4] Click each box to learn more.	The slide is divided into 4 rectangles. The upper left rectangle is yellow, with the title Probate Assets and images of a house and a bank. The lower left rectangle is blue, with the title Non-Probate Assets and images of paperwork reflecting an investment account and a life insurance account.  The slide text appears in the upper right rectangle, which is white. The lower right rectangle contains an image of a gavel.	The Probate Assets and Non-Probate Assets rectangles begin in HIDDEN states, showing only their yellow or blue backgrounds. [2-3] Their states change to NORMAL and reveal their titles and images in time with the audio. Clicking the yellow Probate Assets rectangle opens layer 6a. Clicking the blue Non-Probate Assets rectangle opens layer 6b. The next button is disabled until all slide layers have been visited.
Notes:			

Audio	Slide Text	Visual Design	Development
<i>[1] Physical assets such as your home, vehicle, or other physical items of value, are considered probate assets. You'll name beneficiaries for these items directly in your will, but they must still go through the probate process.</i> <i>[2] Some financial assets are also considered probate assets. This includes any accounts for which you are the sole owner, such as a bank account or investment account, if you have not designated a specific beneficiary for the account with the institution that holds it.</i> <i>[3] A court oversees the probate process to ensure that your property is distributed properly, and that any debts are paid before your assets are distributed.</i> <i>[4] The probate process can take months, or even years, and the legal fees can be costly. The best way you can ensure that the probate process goes smoothly is to clearly name beneficiaries for any probate assets in your will.</i>	[SlideTitle] Probate vs. Non-Probate Assets [Slide Text] • [1] Physical assets • [2] Financial assets with no pre-designated beneficiary (investment, bank accounts) • [3] Probate court oversees their distribution • [4] Can be slow and costly	Same layout as the base layer, except the upper right rectangle is the same shade of yellow as the upper left, making it appear as if the text has opened up next to its title. All slide text appears in the new yellow rectangle. The Probate Assets and Non-Probate Assets rectangles remain in their NORMAL states, revealing their titles and images.	Clicking the blue Non-Probate Assets rectangle opens layer 6b. The next button is disabled until both slide layers have been viewed.
Notes:			

Layer [1.6b]			Objective: [1, 2]
Audio	Slide Text	Visual Design	Development
<i>[1] Any financial assets for which you designate a beneficiary directly with the issuing institution are called non-probate assets. Non-probate assets can pass directly to a beneficiary, without going through the probate process.</i> <i>[2] This includes certain financial accounts, such as retirement accounts and life insurance policies, and any assets that are part of a living trust.</i> <i>[3] To prevent these assets from going into probate, you MUST designate a beneficiary directly with the institution that holds the account. [4] This is frequently done when you set up the account, and many financial institutions allow you to add or update a beneficiary through their online account portal.</i> <i>[5] It is a good idea to review all of your accounts to make sure that your preferred beneficiaries are identified.</i>	[SlideTitle] Probate vs. Non-Probate Assets [Slide Text] • [1] Can pass directly to a beneficiary • [2] Certain financial accounts (retirement accounts, life insurance) • [2] Assets in a living trust • [3] Must name a beneficiary directly with the institution • [4] Can usually be updated online	Same layout as the base layer, except now the gavel image appears on the upper right, and the lower right rectangle is the same shade of blue as the lower left, making it appear as if the text has opened up next to the title. All slide text appears in the new blue rectangle. The Probate Assets and Non-Probate Assets rectangles remain in their NORMAL states, revealing their titles and images.	Clicking the yellow Probate Assets rectangle opens layer 6a. The next button is disabled until both slide layers have been viewed.
Notes:			

Slide [1.7]/			Objective: [1]
Audio	Slide Text	Visual Design	Development
[1] Let's review what we've learned so far. Select all statements that describe the primary function and features of a Last Will & Testament. Then click Submit.	[Slide Title] Let's Review [Knowledge Check Question & Directions] Select all statements that describe the primary function and features of a Last Will & Testament. Then click Submit. [Answer Choices - A, B, and E are Correct] A. It is a legally binding document. B. It identifies who will distribute and receive your assets after your death. C. It prevents all of your assets from going through the probate process. D. It requires a lawyer to serve as executor. E. It identifies who will care for any minor children after your death.	Arthur appears on the left side of the slide, gesturing to the right. The question and answer choices appear in a white rectangle to the right of Arthur's hand. They occupy about $\frac{2}{3}$ of the slide. The background is teal.	Slide 1.7 is a multiple response question. Provide feedback by question, learner has 2 attempts. All slide text is visible when the timeline starts.
Notes:			

Layer [1.7a-c]/Custom Feedback Layers			Objective: [1]
Audio	Slide Text	Visual Design	Development
None	[Slide Title] Let's Review Layer 7a - Correct Response [Slide Text] That's right. You selected the correct response. [Button] CONTINUE Layer 7b - Incorrect Response [Slide Text] Incorrect - The correct responses are A, B, and E. Remember: • Probate assets are required to go through the probate process. • You are not required to name a lawyer as your executor. [Button] CONTINUE Layer 7c - Try Again [Slide Text] That's incorrect. Please try again. [Button] TRY AGAIN	On all three layers, Arthur's avatar is replaced by a yellow square and the Correct/Incorrect/Try again text. A teal checkmark appears above the Correct text. A teal x appears above the incorrect/try again text. The Continue/Try Again buttons are dark blue, and are centered below the yellow box.	All slide text is visible when the timeline starts.
Notes:			

Slide [1.8]/			Objective: [2]
Audio	Slide Text	Visual Design	Development
[1] Now we'll review the difference between probate and non-probate assets. [2] Click and drag each phrase to the appropriate box to describe probate and non-probate assets and how they are managed differently before and after your death. Then click Submit.	[Slide Title] Let's Review [Knowledge Check Question & Directions] [2] Click and drag each phrase to the appropriate box to describe probate and non-probate assets and how they are managed differently before and after your death. Then click Submit. [Drop Targets] Probate Assets Non-Probate Assets [Drag Objects to be placed on the Probate Assets Drop Target] Physical Assets Overseen by a court Retirement & life insurance accounts [Drag Objects to be placed on the Non-Probate Assets Drop Target] Financial assets that can pass directly to a beneficiary Bank & investment accounts Beneficiaries must be named directly with the institution	Same background and avatar placement as slide 1.7. The directions appear in a white box to the right of Arthur. Arthur is gesturing down and to the right, and the drag objects appear near his hand. The two drop targets appear stacked vertically on the right side of the slide. The Probate Assets rectangle is yellow. The Non-Probate Assets rectangle is blue, mirroring the colors from slide 1.6. The drag objects are dark blue, with white font and an icon on each that corresponds to its title. The objects are stacked so that only the top object is visible.	All slide text and objects are visible when the timeline starts. Drag objects are disabled until audio completes. Drag objects are hidden once dropped on any drop target. A number variable is used to tally the number of correct responses.
Notes:			

Layer [1.8a-b]/ Custom Feedback Layers			Objective: [#]
Audio	Slide Text	Visual Design	Development
<i>Nice effort. If you got a 4 or higher, you're ready to move on! If you scored below a 4, use the Review button to revisit the difference between probate and non-probate assets. It can be tricky!</i>	[Slide Title] Let's Review [Arthur Callout] Nice effort, %LearnerName%. If you got a 4 or higher, you're ready to move on! If you scored below a 4, use the Review button to revisit the difference between probate and non-probate assets. It can be tricky! [Score box text] You got ____ out of 6 correct. [Buttons] REVIEW CONTINUE	Layers 1.8a (Correct) and 1.8b (Incorrect) are identical. Arthur appears in the same position and pose as on the base layer. The slide text appears in a callout bubble to his right. The score box is yellow. The teal REVIEW and dark blue CONTINUE buttons are aligned below the yellow box.	All slide text and objects are visible when the timeline starts. The REVIEW button opens slide 1.6 as a lightbox.
Notes:			

Slide [1.9]/ Menu Title: <i>[Powers of Attorney]</i>			Objective: [3]
Audio	Slide Text	Visual Design	Development
<i>[1] Let's keep at it. You're now familiar with how preparing a will helps ensure that your assets are distributed properly after your death.</i> <i>[2] It is also important to prepare for a situation in which you are still alive, but unable to make medical or financial decisions for yourself, perhaps as a result of serious injury or illness.</i> <i>[3] The best way to prepare for such a situation is to identify a person or people with [4] power of attorney.</i> <i>[5] This means they have the legal authority to make decisions for you if you are not able to.</i> <i>[6] Click the buttons below to learn about the different powers of attorney.</i>	[Slide Title] Powers of Attorney [Arthur Callouts] [2] It is also important to prepare for a situation in which you are still alive, but unable to make medical or financial decisions for yourself. [3] The best way to prepare for such a situation is to identify a person or people with power of attorney. [Rectangle Labels] Last Will & Testament Naming of Beneficiaries Powers of Attorney [Slide text] [4] Powers of Attorney [5] Someone with power of attorney has the legal authority to make decisions for you if you are not able to. [Directions] [6] Click the buttons below to learn about the different powers of attorney. [Rectangle Labels] Medical Power of Attorney Financial Power of Attorney	The background is once again the comfortable living room. Arthur is standing on the left half of the slide. The right half is occupied by a white rectangle with the 4 yellow boxes from slide 1.3. The top two boxes (Last Will & Testament and Naming of Beneficiaries" are in the REVEAL state, showing their titles. The right side of the slide is divided into a large upper rectangle, and two small lower rectangles. The Power of Attorney term and definition, as well as the directions, appear in a white rectangle on the upper right quadrant, against the living room background. The lower rectangles are blue and yellow, labeled respectively Medical Power of Attorney and Financial Power of Attorney. Both contain a corresponding icon.	Arthur is Talking. Callout text is timed with the audio. [3] The third yellow box changes to CLICK TO CONTINUE state to become teal, and reveal the title Powers of Attorney. [4] The white rectangle/yellow boxes disappear to reveal the right side of the slide. [6] Arthur gestures downward to point at the yellow and blue boxes. The blue and yellow boxes trigger slide layers A and B. The Next button is disabled until all slide layers have been visited.
Notes:			

Layer [1.9a]			Objective: [3]
Audio	Slide Text	Visual Design	Development
[1] A medical power of attorney can make important medical decisions for you if you are incapacitated. [2] This could include choosing [3] treatment options, [4] choices about surgery or medication, or [5] end-of life care. [6] The person or people you name are referred to as healthcare agents or proxies. Be sure to discuss your decision with them beforehand.	[Slide Title] Powers of Attorney [Slide Text] [1] Medical Power of Attorney A medical power of attorney can make important medical decisions for you if you are incapacitated. [2] Includes decisions about: • [3] Medication & treatment options • [4] Life sustaining measures • [5] End of life care [6] The person or people you name are referred to as healthcare proxies. [Directions] Click CLOSE to return to the previous page. [Rectangle Labels] Medical Power of Attorney [Buttons] CLOSE	This layer appears over the base layer. A solid white rectangle covers the right side of the screen, where Arthur was on the base layer. All slide text and buttons appear within this white rectangle. The upper right rectangle contains an image relevant to the content. The blue Medical Power of Attorney box is visible from the base layer. The yellow Financial Power of Attorney box is in a custom state to show only solid yellow.	The directions and CLOSE button appear upon completion of the audio. The CLOSE button returns the user to the base layer.
Notes:			

Layer [1.9b]			Objective: [3]
Audio	Slide Text	Visual Design	Development
[1] A financial power of attorney can make important financial decisions for you if you are incapacitated. [2] This includes [3] paying taxes, [4] selling property, or [5] paying medical or other bills. [6] This is especially important if your loved ones rely on you to pay bills or manage the household finances. [7] The person or people you name as financial powers of attorney are referred to as financial agents. [8] Before you name a medical or financial power of attorney, you should discuss your decision with the person and make sure they are willing to serve and understand your wishes.	[Slide Title] Powers of Attorney [Slide Text] [1] Financial Power of Attorney A financial power of attorney can make important financial decisions for you if you are incapacitated. [2] This includes: • [3] Paying taxes • [4] Selling property • [5] Paying medical or other bills [7] The person or people you name are referred to as financial agents. [Directions] Click CLOSE to return to the previous page. [Rectangle Labels] Financial Power of Attorney [Buttons] CLOSE	This layer appears over the base layer. A solid white rectangle covers the right side of the screen, where Arthur was on the base layer. All slide text and buttons appear within this white rectangle. The upper right rectangle contains an image relevant to the content. The yellow Financial Power of Attorney box is visible from the base layer. The blue Medical Power of Attorney box is in a custom state to show only solid blue.	The directions and CLOSE button appear upon completion of the audio. The CLOSE button returns the user to the base layer.
Notes:			

Slide [1.10]/ Menu Title: <i>[Advance Healthcare Directive]</i>			Objective: [3]
Audio	Slide Text	Visual Design	Development
<i>[1] We discussed the importance of naming a medical power of attorney, also known as a healthcare proxy, to ensure that there is someone empowered to make medical decisions for you if you are not able to.</i> <i>[2] You can provide additional guidance and guidelines for your healthcare proxy by preparing an Advance Healthcare Directive, sometimes referred to as a living will.</i>	[Slide Title] Advance Healthcare Directive [Arthur Callouts] [1] We discussed the importance of naming a medical power of attorney or healthcare proxy to ensure that there is someone empowered to make medical decisions for you if you are not able to. [2] You can provide additional guidance for your healthcare proxy by preparing an Advance Healthcare Directive, also referred to as a living will. [Rectangle Labels] Last Will & Testament Naming of Beneficiaries Powers of Attorney Advance Healthcare Directive	The slide is setup identical to slide 1.9, with Arthur on the left in the living room, and the white rectangle and yellow boxes on the right. The first three boxes are in REVEAL state to show their titles against a yellow background.	[2] The fourth yellow box changes to CLICK TO CONTINUE state, becoming teal, and showing the title Advance Healthcare Directive. The next button is hidden on the base layer. Layer 11a opens automatically when the timeline ends on the base layer.
Notes:			

Layer [1.10a]			Objective: [3]
Audio	Slide Text	Visual Design	Development
[1] Your healthcare proxy, who you can name in this document, must use the instructions laid out in the directive as a guide when making medical decisions. [2] An Advance Healthcare Directive outlines your healthcare preferences ahead of time. [3] It clearly states your wishes about a number of details, including: • [4] Artificial resuscitation or ventilator use if your heart stops or you are unable to breathe independently • [5] Artificial hydration or nutrition if you are unable to eat or drink on your own • [6] Organ and tissue donation, and • [7] Comfort care or hospice care Most states have their own Advance Directive forms, and some require your form to be witnessed or notarized.	[Slide Title] Advance Healthcare Directive [Slide Text] You can provide guidelines for your healthcare proxy with an Advance Healthcare Directive or living will. [3] Clearly states your wishes about: • [4] Artificial resuscitation or ventilator use • [5] Artificial hydration or nutrition • [6] Organ & tissue donation • [7] Comfort or hospice care	The slide background shows an empty hospital bed. Ex:  The slide title appears in white against the background image. There is no black title bar on this layer. A white rectangle occupies the left half of the screen. All slide text appears within the white rectangle.	The Next button appears when the timeline ends on this layer. Next button jumps to 1.11
Notes:			

Slide [1.11]/ Menu Title: <i>[Let's Review]</i>			Objective: [3]
Audio	Slide Text	Visual Design	Development
[1] Let's review. Read each statement at the bottom of your screen. Then place it in the column under the term that it describes.	[Slide Title] Let's Review [Directions] Read each statement. Then place it in the column under the term that it describes. Click Submit when finished. [Drop Target Labels] Medical Power of Attorney Financial Power of Attorney Advance Healthcare Directive [Drag object labels] Makes medical decisions for you if incapacitated Makes financial decisions for you if incapacitated Clearly states your wishes about medical care if incapacitated Provides guidelines for your healthcare proxy Can pay taxes, settle bills, or sell property for you Also called a financial agent Can approve treatment or end of life care for you Varies by state, and may have to be notarized Also called a healthcare proxy	The slide is divided into three equal columns. The background is teal blue. Within each column is a white rectangle, titled within a dark blue bar at the top (Medical Power of Attorney, Financial Power of Attorney, Advance Healthcare Directive). At the beginning of the timeline, Arthur stands on the left-hand side, gesturing to the right towards the directions. The directions are at the bottom of the screen within a white rectangle. The rectangle is offset slightly to the right, next to Arthur's feet. The statements appear in yellow rectangles, centered below the center white rectangle (Financial POA).	This slide is a drag and drop interaction. Feedback by question. Learner has 2 attempts. When audio completes, the Arthur avatar disappears and the first yellow drop object appears. Drop objects appear one at a time, and snap to the drop target under the title when they are dropped. Drag objects remain visible when they are dropped within any drop target.
Notes:			

Layer [1.11a-c]/ Custom feedback layers			Objective: [3]
Audio	Slide Text	Visual Design	Development
None	[Slide Title] Let's Review [Score Box Text] 1.11a: Nice work, %LearnerName%! 1.11b: That's incorrect. Please try again. [Directions] 1.11c: Sorry, that's incorrect. Review the correct response above, then click Continue. [Buttons] 1.11a: CONTINUE 1.11b: Try Again 1.11c: CONTINUE	1.11a & 1.11b (Correct/Try Again feedback) The base layer is not hidden. The score box appears in dark blue over the learner's submission. Try Again/CONTINUE buttons are centered below the score box. 1.11c (Incorrect feedback) There is no score box on the incorrect layer (1.11c). An image of the correct answer fills the slide. At the bottom, a dark blue rectangle contains instructions for the learner to review the correct responses and then click Continue. The CONTINUE button appears below the directions.	Try Again button returns to 1.11 CONTINUE button jumps to 1.12
Notes:			

Slide [1.12]/ Menu Title: <i>[Storing & Sharing Your End of Life Plans]</i>			Objective: [5]
Audio	Slide Text	Visual Design	Development
[1] Once you have planned and prepared your End of Life documents, it is important that you store them in a safe place, and share essential information with your loved ones. [2] There are multiple ways to store your End of Life Planning documents. [3] Click the icons below to compare different storage options, and review key recommendations for sharing your documents.	[Slide Title] Storing & Sharing Your End of Life Plans [Arthur Callouts] [1] Once you have planned and prepared your End of Life documents, it is important that you store them in a safe place, and share essential information with your loved ones. [2] There are multiple ways to store your End of Life Planning documents. Click the icons below to compare different storage options, and review key recommendations for sharing your documents. [Directions] [3] Click the icons in order to compare different storage options & review key recommendations for sharing your documents. [Buttons] Icons representing each layer will act as buttons. They do not contain text.	Arthur stands in the living room. Callouts appear to the right. The bottom third of the screen contains a white rectangle with five icons aligned horizontally that correspond to the five slide layers (Store physical copies; Store digital copies; Inform others; Ensure access; Keep updated) Examples:  All icons have hover states in a lighter teal shade. The directions appear above the icons.	[3] The white rectangle with icon buttons appears. All rectangles are disabled until audio completes. The next button is disabled until the user has visited all 5 layers.
Notes:			

Layer [1.12a]			Objective: [5]
Audio	Slide Text	Visual Design	Development
<i>[1] You can place physical copies of all documents in a protected place such as a safe-deposit box or fireproof file cabinet. It is recommended to make multiple copies and store them in more than one location.</i>	[Slide Title] Store Physical Copies [Slide Text] [1] Place physical copies of all documents in a protected place. Make multiple copies and store them in more than one location.	The entire base layer is visible, with the exception of Arthur's avatar. A white rectangle approximately twice as wide as the first icon appears immediately above it, in front of the living room background. All slide text is contained within the white rectangle. There is also an image that corresponds to the slide content. 	All slide text and images appear on the layer at all times, with no fade in animation. All icons are clickable within each layer.
Notes:			

Layer [1.12b]			Objective: [5]
Audio	Slide Text	Visual Design	Development
<i>[1] You can also store your documents digitally, on a hard drive or USB drive, or on a password-protected online storage system.</i>	[Slide Title] Store Digital Copies [Slide Text] [1] Store documents digitally. • Hard drive or USB drive • Password-protected online storage	Same visual design as 1.12a 	Same as 1.12a
Notes:			

Layer [1.12c]			Objective: [5]
Audio	Slide Text	Visual Design	Development
<i>[1] Regardless of which method you choose, be sure to do the following: Inform your will executor, power of attorney agents, and any other important people of the location of your End of Life Planning documents.</i>	[Slide Title] Inform Others [Slide Text] [1] Inform key people of the location of your documents. • Executor • Powers of attorney • Other important people	Same visual design as 1.12a 	Same as 1.12a
Notes:			

Layer[1.12d]			Objective: [5]
Audio	Slide Text	Visual Design	Development
[1] Ensure they can access the documents. Provide a key if they are in a safe deposit box or file cabinet. If they are password protected, ensure they have the password.	[Slide Title] Ensure Access [Slide Text] [1] Make sure all necessary people can access the documents • Provide a key or password	Same visual design as 1.12a 	Same as 1.12a
Notes:			

Layer[1.12e]			Objective: [5]
Audio	Slide Text	Visual Design	Development
[1] Keep your documents up to date by revising them every 3-5 years, or after any big life events or changes, like the birth of a child or grandchild. Notify the relevant people of any changes to your documents.	[Slide Title] Keep Updated [Slide Text] Update documents frequently • Every 3-5 years • After big life events Notify the relevant people of any changes to your documents	Same visual design as 1.12a 	Same as 1.12a
Notes:			

Slide [1.13]/ Menu Title: [Summary]			
Audio	Slide Text	Visual Design	Development
[1] While it may be difficult or uncomfortable, preparing an end of life plan and discussing it with your loved ones is the best way to prepare and protect yourself and the people you care most about. [2] Death is inevitable. By preparing for it thoughtfully and intentionally, you can protect the people you love and minimize the financial and administrative burdens that they must carry after you are gone. [3] End of life planning is a gift to you, and to those you love. [4] Now that you have completed this course, you are prepared to: [5] Identify the features and functions of a Last Will & Testament [6] Describe how physical, financial, and digital assets are managed differently before and after your death [7] Recognize how Powers of Attorney documents and Advance Healthcare Directives protect your medical and financial wishes and [8] Identify best practices for storing and sharing your End of Life Plans with loved ones.	[Slide Title] Course Summary [Arthur Callouts] [1] While it may be difficult or uncomfortable, preparing an end of life plan and discussing it with your loved ones is the best way to prepare and protect yourself and the people you care most about. [2] Death is inevitable. By preparing for it thoughtfully and intentionally, you can protect the people you love and minimize the financial and administrative burdens that they must carry after you are gone. [3] End of life planning is a gift to you, and to those you love. [4] Now that you have completed this course, you are prepared to: [Learning Objectives] [5] Identify the features and functions of a Last Will & Testament [6] Describe how physical, financial, and digital assets are managed differently before and after your death [7] Recognize how Powers of Attorney documents and Advance Healthcare Directives protect your medical and financial wishes [8] Identify best practices for storing and sharing your End of Life Plans with loved ones.	The left half of the screen contains Arthur in the living room. As the timeline starts he is talking to the learner. The right half of the screen is occupied by a dark blue rectangle in the upper half, and equal sized teal and yellow rectangles in the lower half, echoing the layout of slide 1.9. Each colored rectangle has a solid colored NORMAL state, as well as a PHOTO state that is an image of a couple. Images represent couples of different ages and backgrounds.  [4] A white rectangle occupies the entire right half of the screen, with Arthur gesturing to the rectangle. The Learning Objectives appear in teal colored rectangles, as in slide 1.3.	[1-3] Beginning at 5.0s, each rectangle changes to PHOTO state for 6 seconds, reverting to NORMAL as the next rectangle changes state. . The next button is disabled. Slide auto-advances to slide 1.14 when timeline ends.
Notes:			

Slide [1.14]/ Menu Title: [Quiz]			
Audio	Slide Text	Visual Design	Development
[1] Before the course concludes, you will answer 5 questions about the End of Life Planning Process. [2] You must receive a score of 80% to pass the course. [3] You may retake the quiz as many times as you like. [4] Once you have passed the quiz, you will have the opportunity to create your own personalized End of Life Planning Checklist. [5] Click the Start Quiz button to begin.	[Slide Title] Course Quiz [Slide Text] [1] Before the course concludes, you will answer 5 questions about the End of Life Planning Process. [2] You must receive a score of 80% to pass the course. [3] You may retake the quiz as many times as you like. [Arthur Callouts] [4] Once you have passed the quiz, you will have the opportunity to create your own personalized End of Life Planning Checklist. [Directions] [5] Click START QUIZ to begin. [Buttons] START QUIZ	Arthur stands in the living room on the left half of the slide. The right half is divided horizontally into two roughly equal white rectangles. The slide text and a related icon appear in the white rectangles. The directions and START QUIZ button appear at the bottom of the screen, in the lower white rectangle.	The Next button is disabled. The START QUIZ button takes learners to slide 1.15
Notes:			

Slide [1.15]/ Question 1 (Hidden From Menu)			Objective: [1, 3]
Audio	Slide Text	Visual Design	Development
Match each document to its primary purpose. Then click Submit.	[Slide Title] Question 1 [Assessment Questions] Match each document to its primary purpose. [Answer Choices & Correct Matches] Last Will & Testament - Dictates how your assets will be distributed after your death Powers of Attorney - Names agent(s) that can make decisions for you if you are unable to Advance Healthcare Directive - Provides guidelines regarding the medical care you wish to receive if you are incapacitated	All assessment question slides contain a solid teal background. Questions and answer choices appear in white rectangles.	Question 1 is a matching drag and drop interaction. Learner has 1 attempt. No immediate feedback. All text and objects are visible when the timeline starts. No animation. Submit jumps to slide 1.16
Notes:			

Slide [1.16]/Question 2 (Hidden From Menu)			Objective: [1, 2, 3]
Audio	Slide Text	Visual Design	Development
Select the person or people that performs each function described below. Then click Submit.	[Slide Title] Question 2 [Assessment Questions] Read each sentence. Then select the person identified in your Last Will & Testament or Powers of Attorney documents that performs each function. [Answer Choices & Correct Matches] Follows the instructions in your will and distributes assets to your beneficiaries - Executor Cares for your minor children after your death - Guardian Makes medical decisions for you if you re unable to - Healthcare proxy Manages and closes your online accounts after your death - Digital Executor Makes financial decisions for you if you are unable to - Financial Agent Inherits your assets upon your death - Beneficiary	All assessment question slides contain a solid teal background. Questions and answer choices appear in white rectangles.	Question 2 is a matching drop-down interaction. All possible matches appear in a drop-down menu next to each answer choice Learner has 1 attempt. No immediate feedback. All text and objects are visible when the timeline starts. No animation. Submit jumps to slide 1.17
Notes:			

Slide [1.17]/ Question 3 (Hidden From Menu)			Objective: [2]
Audio	Slide Text	Visual Design	Development
Match each type of asset to the statement that describes how best to manage it. Then click Submit.	[Slide Title] Question 3 [Assessment Questions] Compare these different types of assets by matching each type of asset to the statement that describes how best to manage it before your death. [Answer Choices & Correct Matches] Probate assets - Ensure that any beneficiaries for these assets are named in your will. Non-probate assets - Ensure beneficiaries for these assets are named directly with the institutions holding the accounts. Digital assets - Make sure a digital executor is named in your will to manage these assets.	All assessment question slides contain a solid teal background. Questions and answer choices appear in white rectangles.	Question 3 is a matching drag and drop interaction. Learner has 1 attempt. No immediate feedback. All text and objects are visible when the timeline starts. No animation. Submit jumps to slide 1.18
Notes:			

Slide [1.18]/ Question 4 (Hidden From Menu)			Objective: [1]
Audio	Slide Text	Visual Design	Development
Mark is preparing his Last Will & Testament. Read about his situation below, and select all of the people that Mark should be sure to name in his will. Then click Submit.	[Slide Title] Question 4 [Assessment Question] Mark is preparing his Last Will & Testament. Read about his situation below and select all of the people that Mark should be sure to name in his will. Then click Submit. <i>Mark is unmarried, lives alone, and has three adult children. He owns his home and car, and has a retirement and life insurance account, as well as numerous email, social media, and online shopping accounts. Mark has an extensive collection of baseball cards, many of which are valuable.</i> [Answer Choices -responses in bold are correct] A. Beneficiaries B. Executor C. Digital executor D. Guardian for minor children E. Pet guardian	All assessment question slides contain a solid teal background. Questions and answer choices appear in white rectangles.	Question 4 is a multiple choice question with multiple responses. Learner has 1 attempt. No immediate feedback. All text and objects are visible when the timeline starts. No animation. Submit jumps to slide 1.19
Notes:			

Slide [1.19]/ Question 5 (Hidden From Menu)			Objective: [5]
Audio	Slide Text	Visual Design	Development
<i>Check the steps you should take to store and share your End of Life Plans with loved ones. Then click Submit.</i>	[Slide Title] Question 5 [Assessment Questions] Check the steps you should take to store and share your End of Life Plans with loved ones. [Answer Choices -responses in bold are correct] A. Create multiple copies and store them in different places. B. Share keys and/or passwords with anyone who will need access after your death. C. Once you have created your plans, do not change them. D. Discuss your plans with your loved ones ahead of time. E. Protect your documents by placing them in a secure location or using a password to restrict access.	All assessment question slides contain a solid teal background. Questions and answer choices appear in white rectangles.	Question 5 is a multiple choice question with multiple responses. Learner has 1 attempt. No immediate feedback. All text and objects are visible when the timeline starts. No animation. Submit submits results and triggers Quiz Results, slide 1.20
Notes:			

Slide [1.20]/Layer [1.20a]			
Audio	Slide Text	Visual Design	Development
[1] Nice job, you passed! You are now prepared to begin the End of Life planning process. [2] If you'd like to review your quiz, click the Review Quiz Button. [3] You also have the option to create a personalized End of Life Planning Checklist by clicking the yellow Create Checklist button. [4] If you're ready to conclude the course, click the Conclude Course button.	[Slide Title] Quiz Results [Arthur Callouts] [1] Nice job %LearnerName%! You passed! You are now prepared to begin the End of Life Planning process. [2] If you'd like to review your quiz, click the Review Quiz Button. [3] You also have the option to create a personalized End of Life Planning Checklist by clicking the yellow Create Checklist button. [4] If you're ready to conclude the course, click the Conclude Course button. [Buttons] [2] REVIEW QUIZ [3] CREATE CHECKLIST [4] CONCLUDE COURSE	The left side of the slide contains Arthur in the living room. He is holding an arm up in a congratulatory gesture. The right side of the slide is white, and divided horizontally. The score box appears in yellow in the upper half. The lower half is divided into two equal rectangles. The text "Nice job, you passed!" and a checkmark icon appear in the left square. The right square contains all three buttons stacked vertically, in a variety of colors from the palette.	The REVIEW QUIZ button reviews the learner's quiz results. The CREATE CHECKLIST button leads the learner to slide 1.21. The CONCLUDE COURSE button leads the learner to slide 1.22.
Notes:			

Slide [1.20]/ Layer [1.20b]			Objective: [#]
Audio	Slide Text	Visual Design	Development
[1] Sorry, but you did not pass. You'll need to retake the quiz. [2] If you'd like, you can use the Review Quiz button to review your results before trying again. [3] When you're ready, click the Retry Quiz button.	[Slide Title] Quiz Results [Arthur Callouts] Sorry, but you did not pass. You'll need to retake the quiz. If you'd like, you can use the Review Quiz button to review your results before trying again. When you're ready, click the Retry Quiz button. [Slide Text] [1] Sorry, you didn't pass. [2] You may review your results before retaking the quiz. [Directions] [3] Use the RETRY QUIZ button to try again. [Buttons] [2] REVIEW QUIZ [3] RETRY QUIZ	The layout is the same as slide 1.20a. An X icon and the text "Sorry, you didn't pass. Use the RETRY QUIZ button to try again." appear in the left square. The right square contains both buttons stacked vertically, in a variety of colors from the palette, as well as the text "You may review your results before retaking the quiz."	The REVIEW QUIZ button reviews the learner's quiz results. The RETRY QUIZ button resets the quiz results and returns the learner to slide 1.15
Notes:			

Slide [1.21]/ Menu Title: <i>[End of Life Planning Checklist]</i>			
Audio	Slide Text	Visual Design	Development
<i>[1] Answer the questions below to create your own personalized End of Life Planning checklist.</i> <i>[2] Click the Submit button when you are finished.</i>	[Slide Title] End of Life Planning Checklist [Table Header - Column 1 - Directions] Answer the questions below to create your personalized checklist. [Table Header - Column 2 - Checkboxes] YES [Table Header - Column 3 - Checkboxes] NO [Checklist Questions] 1. Do you already have a Last Will & Testament? 2. Do you have children that would require care if you were to pass away? 3. Do you have pets that would require care if you were to pass away? 4. Do you have property that you wish to leave to others upon your death? 5. Do you have financial accounts that you wish others to have access to upon your death? 6. Do you have digital accounts that will need to be closed down after your death? 7. Do you currently use a password manager to manage your online log-ins? 8. Have you named medical and financial powers of attorney to make decisions for you if you are unable to? 9. Have you completed an Advance Healthcare Directive that lays out your medical wishes if you are incapacitated? 10. Do you have access to a fireproof file cabinet or safe deposit box? [Buttons] SUBMIT	Solid white background. Arthur stands on the far right side of the slide, looking to the left in a thoughtful pose. Most of the slide is occupied by the checklist, in table form. The table headers appear at the top in a dark blue rectangle. The 10 questions are listed in the rows of the table below, with a YES and NO checkbox next to each question. Table rows alternate between a light blue and a white background to create visual contrast between each question. A dark blue SUBMIT button is at the bottom right of the slide.	When the user clicks a YES or NO checkbox, a teal check appears. [2] Arthur's avatar fades out and the SUBMIT button appears. The next button is disabled when the timeline starts. SUBMITt opens layer 1.21a
Notes:			

Layer [1.21a]					
Audio	Slide Text		Visual Design	Development	
<i>Based on your responses, here are some initial steps you should take to make sure your End of Life Plans are in order. It is a good idea to consult a lawyer for assistance in preparing your end of life documents. But there are also a number of online tools that can assist you in the process. Remember the planning and preparation that you put in now are a gift for your loved ones in the future. When you're ready, click the Next button to conclude the course.</i>	[Slide Title] End of Life Planning Checklist		The table and YES/NO responses show through from the base layer. On the right side of the slide, where Arthur was standing on the base layer, a new column exists in the table with the title CHECKLIST. In the new column, a teal rectangle appears in each row. Each teal rectangle has both a YES and NO state that reveal a next step depending on the user's response to that question.	Each teal rectangle has a YES and NO state that tailors the next step to the user's response to the question. The Next button appears when the timeline ends on this slide.	
	[Table Header - Column 4 - Next Steps] CHECKLIST				
	[NEXT STEPS]				
	Q#	Text if user's response was YES			Text if user's response was NO
	1	Review your current will to ensure that it is up to date and complete.			Draft a will with the help of a lawyer or online tool.
	2	Name a guardian in your will and discuss your wishes with the person.			BLANK
	3	Name a pet guardian in your will and discuss your wishes with the person.			BLANK
	4	Name specific beneficiaries in your will for each possession.			Name a general beneficiary for your estate in your will.
	5	Name a beneficiary for each account, in your will or with the specific institution.			BLANK
	6	Name a digital executor in your will and provide them with access to passwords.			BLANK
	7	Provide access information for your digital executor upon your death.			Utilize a password manager to store digital log-ins.
	8	Discuss your wishes with the person or people you have chosen.			Complete Powers of Attorney documents to name a person or people as your financial agent and healthcare proxy.
9	Ensure the document is accurate and that your healthcare proxy is aware of your wishes.	Find the form for your state online and have it notarized if necessary.			
10	Ensure your updated plans are stored safely & also make digital copies.	Ensure that digital copies of your plans exist and are shared with loved ones.			
Notes:					

Slide [1.22]/ Menu Title: [Conclusion]			
Audio	Slide Text	Visual Design	Development
[1] Congratulations on completing the course! [2] You're now on your way to ensuring that your affairs are in order for the future. [3] Thank you for your time and attention, and I hope that you feel more prepared to face the End of Life Planning process after our time together. [4] Be sure to click the Resources tab to download the End of Life Planning Guide, an easy to use document that lays out the many ways that Horizon Estate Planning Services can support you through your End of Life Planning process. [5] When you are ready, click the Exit Course button to close out the course.	[Slide Title] CONGRATULATIONS! [Arthur Callouts] Congratulations on completing the course, %LearnerName%! [2] You're now on your way to ensuring that your affairs are in order for the future. [3] Thank you for your time and attention, and I hope that you feel more prepared to face the End of Life Planning process after our time together. [4] Be sure to click the Resources tab to download the End of Life Planning Guide, an easy to use document that lays out the many ways that Horizon Estate Planning Services can support you through your End of Life Planning process. [4] When you are ready, click the Exit Course button to close out the course. [Buttons] [5] EXIT COURSE	Arthur stands in the living room, his arm raised in a congratulatory gesture. Speech callouts appear to the right. [4] The Resources callout shape from the Navigation Assistant slide 1.2 points to the Resources tab in the upper right corner. [5] A white rectangle containing the teal EXIT COURSE button appears on the bottom half of the screen, to the right of Arthur.	The slide transitions in using a Dissolve transition over 1.5 seconds. [2] Arthur changes to a talking state. [4] Arthur gestures up to the upper right corner of the slide. Resources callout appears pointing at the resources tab. [5] Arthur gestures down toward the EXIT COURSE button. [5] The EXIT COURSE button exits the learner from the course.
Notes:			