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

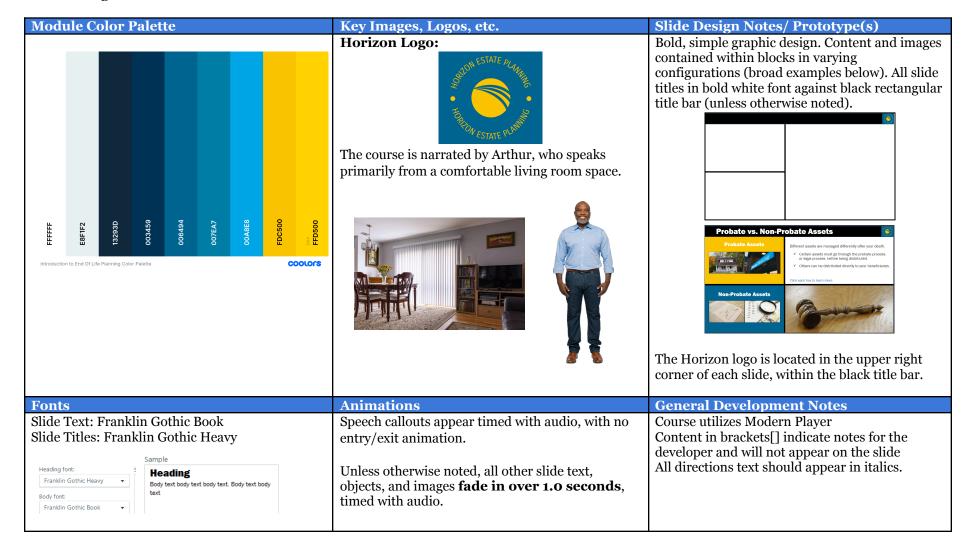
### **Course Overview**

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	
<ol> <li>Identify the features and functions of a Last Will &amp; Testament</li> <li>Describe how physical, financial, and digital assets are managed differently before and after your death</li> <li>Recognize how Powers of Attorney documents and Advance Healthcare Directives protect your medical and financial wishes</li> <li>Identify best practices for storing and sharing your End of Life Plans with loved ones.</li> </ol>	4. What is End of Lit 5. Purpose & feature 6. Managing Probate 7. Knowledge Check 8. Medical & Finance 9. Advance Healthca 10. Knowledge Check 11. Storing & Sharing 12. Course Summary 13. Course Quiz	on & Learning Objectives  The Planning? The Soft the Last Will & Testament The Vis. Non-Probate Assets  The Soft Attorney The Directives  The Your End of Life Plans  The Planning Checklist

#### **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**



# **Detailed Module Outline**

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

Slide Text   Visual Design   Development	Slide [1.2]/ Menu Title: [Navigation Assistant]				
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] All callouts except Previous/Next fade out.  [8] Previous/Next fade out.  [9] Previous/Next fade out.  [1] All callouts except Previous/Next fade out.  [1] Previous/Next fade out.  [2] Previous/Next fade out.  [3] Course Menu  [4] Play/Pause  [5] Player Settings  [6] Resources  [6] Resources  [7] All callouts except Previous/Next fade out.  The Next button advances the learner to the next slide.  [8] Play/Pause  [9] Previous/Next fade out.  The Next button advances the learner to the next slide.  [9] Play/Pause  [1] Play/Pause  [1] Play/Pause  [1] Play/Pause  [2] Previous/Next  [3] Course Menu  [4] Play/Pause  [5] Player Settings  [6] Resources  [6] Resources  [7] To exit the Navigation Assistant and begin the course,	Audio	Slide Text	Visual Design	Development	
click the Next button	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,	Navigation Assistant  [Callout Labels] [2] Previous/Next [3] Course Menu [4] Replay [4] Play/Pause [5] Player Settings	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	Previous/Next fade out.  The Next button advances the learner to the next	

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

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

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

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

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	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	[2-3] Images fade in one at a time, each timed to corresponding audio.
	asset.	correspond to the types of assets mentioned (house, car, bank accounts, etc.)	
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.  Notes:	[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.

Layer [1.5e] Objective: [1]			
Audio	Slide Text	Visual Design	Development
[1] If you have minor children, your will should name a	[Slide Title]	The slide title appears at	F.3 x C 1 ' '11
guardian or co-guardians to care for them in the event of your death.	Guardianship	the top of the open accordion tab.	[1] Image fades in with text
[2] You may also decide to use your will to establish a financial trust that can be accessed by the guardian you	[Slide Text] [1] If you have minor children, your will	The slide text appears	
name, or by your children when they reach a certain age.	should name a guardian to care for them in the event of your death.	underneath the title.	
[3] You can also include wishes for how your children are raised, such as the type of school they attend.	You may also decide to:  • [2] Establish a financial trust	Also included in the open tab is an image of a parent	
[4] Or name a secondary guardian to care for them if the primary guardian is no longer able to. [5] Be sure to discuss your plans and wishes ahead of	<ul> <li>[3] Document your wishes for how your children are raised</li> <li>[4] Name a secondary guardian</li> </ul>	with a child. Ex:	
time with the person or people you select as guardians, to ensure that they are willing and able to carry out your wishes.	[5] Be sure to discuss your plans and wishes with the person or people you select as guardians.		
Notes:			

[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 long life span, such as a parrot or horse, or long life span, such as a parrot or horse, or long life span, such as a parrot or horse, or long life span such as a parrot	Layer [1.5f]			Objective: [1]
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.  [5] Ide 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  [4] The slide title appears at the top of the open accordion tab.  [5] The slide text appears underneath the title.  Also included in the open tab is an image of a person and their pet. Ex:  [5] Image fades in with text	Audio	Slide Text	Visual Design	Development
Notes:	[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 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	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	[1] Image fades in with text

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

**Notes:** 

Audio	Slide Text	Visual Design	Development
[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. [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. [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. [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.	[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.

Layer [1.6b] Objective: [1, 2]			
Audio	Slide Text	Visual Design	Development
[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. [2] This includes certain financial accounts, such as retirement accounts and life insurance policies, and any assets that are part of a living trust. [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. [5] It is a good idea to review all of your accounts to make sure that your preferred beneficiaries are identified.  Notes:	[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.

Slide [1.7]/			Objective: [1]
Audio	Slide Text	<b>Visual Design</b>	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.	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 <sup>2</sup> / <sub>3</sub> of the slide.	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:	<ul><li>C. It prevents all of your assets from going through the probate process.</li><li>D. It requires a lawyer to serve as executor.</li><li>E. It identifies who will care for any minor children after your death.</li></ul>	The background is teal.	

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

Slide Text   Visual Design   Development	Layer [1.8a-b]/ Custom Feedback Layers	3		Objective: [#]
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!  [Arthur Callout]  Nice effort, you got a 4 or higher, you're ready to move on! If you got a 4 or higher, you're ready to move on! If you got 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.  [Score box text] You got out of 6 correct.  [Buttons]  Let's Review  (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.	Audio	Slide Text	Visual Design	Development
CONTINUE	ready to move on! If you scored below a 4, use the Review button to revisit the difference between probate and non-probate	[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	(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	visible when the timeline starts.  The REVIEW button opens

Slide [1.9]/ Menu Title: [Pou	Slide [1.9]/ Menu Title: [Powers of Attorney] Objective: [3]			
Audio	Slide Text	Visual Design	Development	
	[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	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		
learn about the different	[6] Click the buttons below to learn about the different powers of attorney.  [Rectangle Labels]  Medical Power of Attorney	The lower rectangles are blue and yellow, labeled respectively Medical Power of Attorney and Financial Power of Attorney. Both contain a corresponding icon.		
Notes:	Financial Power of Attorney			

Layer [1.9a]			Objective: [3]
Audio	Slide Text	Visual Design	Development
[1] A medical power of	[Slide Title]	This layer appears over	
attorney can make	Powers of Attorney	the base layer.	The directions and
important medical			CLOSE button appear
decisions for you if you are	[Slide Text]	A solid white rectangle	upon completion of the
incapacitated.	[1] Medical Power of Attorney	covers the right side of the	audio.
	A medical power of attorney can make important medical decisions for	screen, where Arthur was	
[2] This could include	you if you are incapacitated.	on the base layer. All slide	The CLOSE button
choosing [3] treatment	[2] Includes decisions about:	text and buttons appear	returns the user to the
options, [4] choices about	• [3] Medication & treatment options	within this white	base layer.
surgery or medication, or	• [4] Life sustaining measures	rectangle.	
[5] end-of life care.	• [5] End of life care	m : 1 : 1	
[6] [7]	[6] ml	The upper right rectangle	
[6] The person or people	[6] The person or people you name are referred to as <b>healthcare</b>	contains an image relevant to the content.	
you name are referred to as	proxies.	relevant to the content.	
healthcare agents or proxies. Be sure to discuss	[Directions]	The blue Medical Power	
your decision with them	Click CLOSE to return to the previous page.	of Attorney box is visible	
beforehand.	Click CLOSE to return to the previous page.	from the base layer. The	
ocjorchana.	[Rectangle Labels]	yellow Financial Power of	
	Medical Power of Attorney	Attorney box is in a	
	inculcul 1 office of fittoriney	custom state to show only	
	[Buttons]	solid yellow.	
	CLOSE		
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.	[Slide Title] Powers of Attorney	This layer appears over the base layer.	The directions and CLOSE button appear
[2] This includes [3] paying taxes, [4] selling property, or [5] paying medical or other bills.	[Slide Text] [1] Financial Power of Attorney A financial power of attorney can make important	A solid white rectangle covers the right side of the screen, where Arthur was on	upon completion of the audio.
[6] This is especially important if your loved ones rely on you to pay bills or manage the household finances.	financial decisions for you if you are incapacitated.  [2] This includes:  • [3] Paying taxes  • [4] Selling property  • [5] Paying medical or other bills	the base layer. All slide text and buttons appear within this white rectangle.  The upper right rectangle	The CLOSE button returns the user to the base layer.
[7] The person or people you name as financial powers of attorney are referred to as financial agents.	[7] The person or people you name are referred to as <b>financial agents.</b>	contains an image relevant to the content.	
[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.	[Directions] Click CLOSE to return to the previous page.  [Rectangle Labels] Financial Power of Attorney	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.	
Notes:	[Buttons] CLOSE	state to show only solid black	

Slide [1.10]/ Menu Title: [A	Advance Healthcare Directive]		Objective: [3]
Audio	Slide Text	Visual Design	Development
[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. [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.	[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	[Slide Title] Advance Healthcare Directive  [Slide Text] You can provide guidelines for your healthcare proxy with an Advance	The slide background shows an empty hospital bed. Ex:	The Next button appears when the timeline ends on this layer.
<ul> <li>states your wishes about a number of details, including:</li> <li>[4] Artificial resuscitation or ventilator use if your heart stops or you are unable to breathe independently</li> <li>[5] Artificial hydration or nutrition if you are unable to eat or drink on your own</li> <li>[6] Organ and tissue donation, and</li> <li>[7] Comfort care or hospice care</li> <li>Most states have their own Advance Directive forms, and</li> </ul>	<ul> <li>Healthcare Directive or living will.</li> <li>[3] Clearly states your wishes about: <ul> <li>[4] Artification resuscitation or ventilator use</li> <li>[5] Artificial hydration or nutrition</li> <li>[6] Organ &amp; tissue donation</li> </ul> </li> </ul>	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	Next button jumps to 1.11
some require your form to be witnessed or notarized.	• [7] Comfort or hospice care	of the screen. All slide text appears within the white rectangle.	
Notes:			

Slide [1.11]/ Menu Ti	tle: [Let's Review]		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	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	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.
	Varies by state, and may have to be notarized Also called a healthcare proxy	white rectangle (Financial POA).	
Notes:			

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

Slide [1.12]/ Menu Title:	: [Storing & Sharing Your End of Life Plans]		Objective: [5]
Audio	Slide Text	Visual Design	Development
[1] Once you have planned and prepared your End of Life	[Slide Title] Storing & Sharing Your End of Life Plans	Arthur stands in the living room. Callouts appear to the right.	[3] The white rectangle with icon buttons
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.	[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.	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:	appears.  All rectangles are disabled until audio completes.  The next button is disabled until the user has visited all 5 layers.
[3] 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.		
Notes:		All icons have hover states in a lighter teal shade. The directions appear above the icons.	

Layer [1.12a]			Objective: [5]
Audio	Slide Text	Visual Design	Development
[1] You can place physical copies of all documents in a protected place such as a safe-deposit box or fireproof file	[Slide Title] Store Physical Copies [Slide Text]	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 and images appear on the layer at all times, with no fade in
cabinet. It is recommended to make multiple copies and store them in more than one location.  Notes:	[1] Place physical copies of all documents in a protected place.  Make multiple copies and store them in more than one location.	All slide text is contained within the white rectangle. There is also an image that corresponds to the slide content.	animation. All icons are clickable within each layer.

Layer [1.12b]			Objective: [5]
Audio	Slide Text	Visual Design	Development
[1] You can also store your documents digitally, on a hard drive or USB drive, or on a password-protected online storage system.	[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]				
Audio	Slide Text	Visual Design	Development	
[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.	[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	[Slide Title]	Same visual design as 1.12a	Same as 1.12a
documents. Provide a key if they are	Ensure Access	_	
in a safe deposit box or file cabinet. If			
they are password protected, ensure	[Slide Text]	America Company	
they have the password.	[1] Make sure all necessary people can access the documents	the state of the s	
	Provide a key or password		
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	Keep Updated [Slide Text]	Same visual design as 1.12a	Same as 1.12a
the relevant people of any changes to your documents.	Update documents frequently	and the second	

Audio [1] While it may be difficult or	Slide Text [Slide Title]	Visual Design	Development
[1] While it may be difficult or	[Slide Title]		
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.	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.	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.	[1-3] Beginning at 5.0s, each rectangle changes to PHOTO state for 6 seconds, reverting to NORMAL as the next rectangle changes state.
[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.	[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.	[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.	The next button is disabled. Slide auto-advances to slide 1.14 when timeline ends.
Notes:			

Slide [1.14]/ Menu Title: [Quiz]	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.	[Slide Title] Course Quiz  [Slide Text] [1] Before the course concludes, you will answer 5 questions about the End of Life Planning Process.	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 Next button is disabled.  The START QUIZ button takes learners to slide 1.15		
<ul><li>[4] Once you have passed the quiz, you will have the opportunity to create your own personalized End of Life Planning Checklist.</li><li>[5] Click the Start Quiz button to begin.</li></ul>	[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.	The directions and START QUIZ button appear at the bottom of the screen, in the lower white rectangle.			
Notes:	[Buttons] START QUIZ				

Slide [1.15]/	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]/Qu	<b>Objective:</b> [1, 2, 3]		
Audio	Slide Text	Visual Design	Development
Select the	[Slide Title]	All assessment	Question 2 is a matching
person or	Question 2	question slides	drop-down interaction.
people that		contain a solid	All possible matches
performs each	[Assessment Questions]	teal background.	appear in a drop-down
function	Read each sentence. Then select the person identified in your Last Will & Testament or	Questions and	menu next to each answer
described	Powers of Attorney documents that performs each function.	answer choices	choice
below. Then		appear in white	
click Submit.	[Answer Choices & Correct Matches]	rectangles.	Learner has 1 attempt. No
	Follows the instructions in your will and distributes assets to your beneficiaries - Executor		immediate feedback.
	Cares for your minor children after your death - Guardian		
	Makes medical decisions for you if you re unable to - Healthcare proxy		All text and objects are
	Manages and closes your online accounts after your death - Digital Executor		visible when the timeline
	Makes financial decisions for you if you are unable to - Financial Agent		starts. No animation.
	Inherits your assets upon your death - Beneficiary		
			Submit jumps to slide 1.17
Notes:			

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

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

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

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

Slide Text   Slide Title   Quiz Results   Slide Title   Quiz Results	Slide [1.20]/ Layer [1.20b] Objective: [#]					
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.    Color   Color			Visual Design	Development		
[2] REVIEW QUIZ [3] RETRY QUIZ	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	[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	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	button reviews the learner's quiz results.  The RETRY QUIZ button resets the quiz results and returns the learner to		

	itle: [End of Life Planning Checklist]			
Audio	Slide Text	Visual Design	Development	
[1] Answer the questions below to	[Slide Title] End of Life Planning Checklist	Solid white background. Arthur stands on the far right side of the slide,	When the user clicks a YES or NO checkbox, a teal check appears	
create your own personalized End of Life Planning checklist.  [2] Click the Submit button when you are finished.	[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?	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	teal check appears.  [2] Arthur's avatar fades out and the SUBMIT button appears.  The next button is disabled when the timeline starts.	
	<ol> <li>Do you have children that would require care if you were to pass away?</li> <li>Do you have pets that would require care if you were to pass away?</li> <li>Do you have property that you wish to leave to others upon your death?</li> <li>Do you have financial accounts that you wish others to have access to upon your death?</li> <li>Do you have digital accounts that will need to be closed down after your death?</li> <li>Do you currently use a password manager to manage your online log-ins?</li> <li>Have you named medical and financial powers of attorney to make decisions for you if you are unable to?</li> <li>Have you completed an Advance Healthcare Directive that lays out your medical wishes if you are incapacitated?</li> <li>Do you have access to a fireproof file cabinet or safe deposit box?</li> </ol>	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.	SUBMITt opens layer 1.21a	
	[Buttons] SUBMIT			
Notes:				

Layer [1.21a]						
Audio	Slide	Text		Visual Design	Development	
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	End of [Table CHEC	e Title] of Life Planning Checklist le Header - Column 4 - Next Steps] EKLIST ET STEPS]	responses show through from the base layer. On the right side of the slide, where			
consult a lawyer for assistance in	Q#	Text if user's response was YES	Text if user's response was NO	Arthur was standing on the	question.	
preparing your end of life documents. But	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.	base layer, a new column exists in	The Next button appears when	
there are also a number of online tools that can assist	2	Name a guardian in your will and discuss your wishes with the person.	BLANK	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	the timeline ends on this slide.	
you in the process. Remember the	3	Name a pet guardian in your will and discuss your wishes with the person.	BLANK			
planning and	4	Name specific beneficiaries in your will for each possession.	Name a general beneficiary for your estate in your will.			
preparation that you put in now are a gift for your loved ones in	ow are a gift loved ones in rec. When sady, click the ton to the course.  Solution to the course.  The course of t		BLANK			
the future. When you're ready, click the			BLANK			
Next button to conclude the course.		reveal a next step depending on the user's response to				
		person or people as your financial agent and healthcare	that question.			
	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:						