Horizon Estate Planning Services
Introduction to End of Life Planning
Design Document

Business Purpose

Horizons Estate Planning Services provides an extensive array of end of life and estate planning services to its clients. We pride ourselves on our personalized service and ability to support our clients through the prospectively stressful or intimidating process of end of life planning. We recognize that our prospective clients have access to many free or low-cost online estate planning resources, and industry focus groups and website surveys indicate that 60% of prospective clients that self-identify as new to or unfamiliar with the end of life planning process are hesitant to commit to a fee-for-service arrangement with Horizons.

By providing prospective clients with an introduction to the End of Life Planning process, we aim to increase their familiarity and comfort level with the End of Life Planning Process and foster their awareness and trust of Horizons Estate Planning Services in order to increase new clients who access Horizon through a self-initiated internet search by 20%.

Target Audience	Training Time
Prospective Horizon clients interested in learning more about the End of Life Planning Process, especially those who are considering purchasing individualized estate or end of life planning services.	30 minutes

Training Recommendation

eLearning course in Articulate Storyline

The course will guide the learner through 4 key documents/steps in the End of Life Planning process and allow the learner to create an individualized End of Life Planning checklist.

An eLearning module is recommended to provide a more personalized ‘human’ touch through the voiceover narration and use of a virtual human avatar. This is appropriate given the prospectively sensitive or emotionally charged nature of the topic, and maximizes the potential of the course to make learners feel safe and supported, and therefore more likely to trust Horizon to guide them through the process. eLearning also allows the course to be easily accessible by prospective clients at the time most convenient to them, regardless of their location.

Deliverables	Learning Objectives
1 storyboard including script Voiceover narration files 1 eLearning module developed in Articulate Storyline, to include: ● Voiceover narration with a confident, conversational tone to promote trust ● Virtual human avatar, mature in age ● Variety of scaffolded interactions to allow learners to progress through each topic in stages, at their own pace. ● Knowledge checks embedded throughout ● Personalized interaction that allows the learner to create an individual End of Life Planning checklist ● Final evaluation (5 questions, including multiple choice and matching questions)	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.

Training Outline

1. Introduction to End of Life Planning
    a. Why is EOLP important?
    b. What documents/steps will this course help me complete?
        i. Last will & testament
        ii. Naming beneficiaries
        iii. Naming powers of attorney
        iv. Advance healthcare directive
2. Last Will & Testament
    a. Purpose and primary features
        i. Names beneficiaries
        ii. Names executor(s)
        iii. Establishes how assets should be distributed
            1. Physical vs. financial assets
            2. Probate vs. non-probate assets
                a. Definition of each
                b. Types of assets in each category
                c. How to name beneficiaries for each type
        iv. Establishes digital executor to manage digital assets
        v. Names guardian(s) of minor children and/or pets
    b. Knowledge check
        i. Primary purposes of last will & testament
        ii. Differentiate between probate & non-probate assets
3. Powers of attorney
    a. Purpose & primary powers of each
        i. Medical power of attorney/healthcare proxy
        ii. Financial power of attorney/financial agent
4. Advance Healthcare Directive
    a. Purpose and primary features
    b. Knowledge check
        i. Compare/contrast medical POA, financial POA, and advance healthcare directive
5. Best practices for storing and sharing End of Life Planning documents
    a. Physical/digital storage
    b. Ensuring access
    c. Updating and communicating plans to loved ones
6. Final Assessment
7. Individualized End of Life Planning checklist
    a. Learner answers yes/no questions about their current end of life planning needs and is provided with customized 'next steps' to take

Assessment Plan
5 question graded final assessment, 80% score required to pass Learner can review quiz results and retake quiz as needed until passing score is achieved