Philadelphia Yearly Meeting

Aging Grants Group Meeting

Franco Salvatori, Stewardship Consultant

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Everence®

Resources:

Financial Choice

- webinar
- counseling

Freed Up Financial Coaching

Senior Health Seminars

Financial Planning/Consulting

Host:
Steve Bustos,
Everence Stewardship Consultant

Presenter:
Kim Miller,
Sr. Program Manager, Financial Choice (LSS)

Stop making a resolution: Turn your financial goals into reality

Webinar by Everence® and Financial Choice (LSS*)

Tuesday, Feb. 11 at 2 p.m. or 8 p.m. ET

You never know when a financial emergency will happen – don't let surprises derail your financial plans. Discover practical strategies to safeguard your finances against unforeseen expenses.

**Everence has partnered with Financial Choice (LSS) since 2008 to provide free financial counseling on a variety of basic financial topics. LSS Financial Counseling is one of the nation's leading consumer credit counseling agencies and has a 35-year history of providing nonprofit, certified financial counseling.*

Register at
everence.com/partners

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Take control
of your finances
Imagine what your life could be like if you could gain control of your finances.
Why wait? Call LSS Financial Counseling now at (877) 809-0039 or learn more at Everence.com.
Free LSS budget, debt and basic financial counseling sponsored by Everence Financial.

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PARTICIPANT OR COUPLE COST:

~~$99~~ **$19 per person/couple with Everence code.***

Discover personal financial training for yourself and members of your congregation with the FreedUp financial program and optional group activities, which help people develop strong habits for personal finances.

Register for the app and workbooks at getfreedup.com.

Download the app from the app store and use it for up to one year from the sign-up date.

WHAT IS FREEDUP?

Designed for everyone in your church, no matter what stage of life and goals. Participants can opt to go through this with a small group, household or individually.

You will take a financial assessment to determine your goals – stability, clarity, or legacy – and gain valuable lessons, develop a spending plan and take steps to achieve your personalized financial goals.

*Only 300 vouchers available at the discounted rate. Couples will pay one fee for two workbooks. **Code: fru23eve**

freed up

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Senior Health Presentations for Congregations

The following presentations are perfect for a Sunday School class, a lunch and learn format, or a special event. Each session should allow time for question and answer following the presentation.

1. **New to Medicare** *(45 minutes)*
   a. Who: Those aged 55+, nearing/already retired, not yet on Medicare.
   b. What: This presentation covers Medicare basics: plan options and when/how to enroll.

2. **Aging parents – What to know about Medicare** *(30-60 minutes)*
   a. Who: For those who have parents on or entering Medicare.
   b. What: This presentation reviews how Medicare works for your aging parents, highlighting some common services needed as they age (hospital stays, skilled nursing, and hospice care). It also addresses some of the areas in which you can support your aging parents on Medicare (POA, navigating Open Enrollment season, creating online accounts, etc.)

3. **Medicare Topics** *(30-60 minutes)*
   a. Who: – For those already on Medicare.
   b. What: – Topics can be addressed singularly in a shorter format or combined for a longer presentation.
      i. Medicare Annual Updates *(fall/winter)*
      ii. How to recognize and avoid Scams and Fraud aimed at Seniors
      iii. Understanding and choosing Medicare Prescription Drug Plans
      iv. Exploring coverage options: Medicare Supplements vs. Medicare Advantage plans
      v. Topic of your choice

4. **Medicare +** *(45-60 minutes)*
   a. Who: - These presentations would be led by an Everence Medicare specialist in conjunction with another Everence professional (Financial Consultant or Stewardship Consultant) and can similarly be done during a Sunday School class, lunch and learn format, or a special event.
   b. What: – A more comprehensive approach toward topics important to Seniors.
      i. Retirement planning
      ii. End of life planning
      iii. Everence helping hands – ways that Everence can help with Medicare options, investments, insurance, and charitable giving.
      iv. Social Security and Medicare
      v. Planning for a move to a continuing care retirement community

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Your local Everence professionals

Providing a team-based approach to **financial services rooted in values.**

How we help:

- Charitable giving, trusts and estate planning.
- Employee benefits.
- Financial planning.
- Investments and retirement plans.
- Life, disability and long-term care insurance.
- Medicare supplement insurance.

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