** SAMPLE SYLLABUS/SPEAKER SCHEDULE **
The Spring 2023 course will have similar topics and speakers.

Holistic Guide to the Golden Years – Legal & Finance
Fall 2021
Wednesdays 2:15-3:30

Elle Van Dahlgren: elle@vandahlgrenlaw.com; 302-407-5009

9/8/2021: **How to Ensure You have the Legal Support You Need: Powers of Attorney, Health Care Directives, Wills, and Revocable Trusts**
Elle Van Dahlgren, Elle Van Dahlgren Law, LLC
(302) 407-5009; elle@vandahlgrenlaw.com

Elle advises clients on matters relating to estate planning, estate and trust administration, probate, and asset protection. In addition, Elle provides counsel on planning for long-term care needs and Medicaid qualification for residents of Delaware. Elle prides herself on working hand in hand with her clients to ensure that they meet the goals of their case while also minimizing stress and ensuring all of her clients understand what is happening in their case.

9/15/2021: **Daily Money Management – Paying Bills and other Financial Organization**
Elizabeth Brown, Principled Money Management, LLC
(484) 301-2262; lizbrown@principledmoney.com

Liz provides support for people who need help ensuring their bills are paid correctly and on time, reconciling bank accounts, dealing with bill collectors, determining the ability to retire, and fear that they will outlive their money. She helps with income tax filings, Medicare elections, Social Security benefits, and, if necessary, long-term care Medicaid qualification.

9/22/2021: **Real Estate and Retirement: Buying and Selling, Tax Credits, Reverse Mortgages, and More**
Tony Klemanski, Berkshire Hathaway HomeServices Fox & Roach REALTORS
(302) 388-7357; anthony.klemanski@gmail.com

Tony has assisted both buyers and sellers achieve their real estate goals for over 15 years. He is licensed in Delaware and Pennsylvania. Tony served as the 2018 president for the New Castle

County Board of Realtors. He is also a licensed real estate instructor and teaches continuing education classes for other agents.

9/29/2021: **Life & Long-Term Care Insurance in Retirement**
Mike Profit, MBA, MassMutual Greater Philadelphia
(302) 528-3864; mprofit@financialguide.com

Mike believes that knowledge is the key to a successful financial future. He seeks to help make your financial future as successful as you need it to be. Mike gets to know each client so that he can understand their individual needs and what matters most to them. This helps Mike recommend products and strategies designed to meet their current needs, and more importantly, their future needs.

10/6/2021: **Financial IQ – Retirement Risks**
Paul M. Mitchell, CFP, CFBS, Precision Wealth Partners
(302) 325-0700; paulmitchell@financialguide.com

Paul is a CFP® Professional with MassMutual Greater Philadelphia. His goal is to help individuals, families, and businesses grow and realize their dreams. He believes in comprehensive planning, a well-thought-out strategy, and ongoing personalized advice around retirement, investments, tax reduction strategies, insurance, asset allocation, estate planning, and employee benefits.

10/13/2021: **Medicare Made Clear: The basics of Medicare and it's costs.**
Yolanda Mohammed, Independent Licensed Health Insurance Broker for Medicare Beneficiaries
(302) 229-6376; ysm.insurance@gmail.com

Yolanda has worked within the health insurance industry for over 10 years. She has contracts with various Medicare approved insurance carriers in the state of Delaware.

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10/20/2021: **Long-Term Care Medicaid – What is It and How Do You Qualify?**
Elle Van Dahlgren, Elle Van Dahlgren Law, LLC
(302) 407-5009; elle@vandahlgrenlaw.com

Elle advises clients on matters relating to estate planning, estate and trust administration, probate, and asset protection. In addition, Elle provides counsel on planning for long-term care needs and Medicaid qualification for residents of Delaware. Elle prides herself on working hand in hand with her clients to ensure that they meet the goals of their case while also minimizing stress and ensuring all of her clients understand what is happening in their case.

10/27/2021**: How and Why to Have the Talk of a Lifetime: Funeral Pre-Planning**
Claire Reynolds, Krienen Griffith Funeral Home
(302) 994-9614; defuneral@verizon.net

Claire has been a part of the funeral business her entire life and is a granddaughter of the founders of Krienen-Griffith Funeral Home. Krienen-Griffith is a 104-year-old, family owned and operated funeral home. They serve families who are planning for a loved one's funeral. They also guide families who are interested in preplanning their funeral or the funeral of a family member. Krienen-Griffith compassionately works with families to ensure that funeral arrangements are carried out with dignity and respect for the decedent and their family.

11/3/2021: **Tax Topics for Seniors**
Adam Necelis, CPA, Necelis CPA
(302) 322-1135; adam@neceliscpa.com

Adam discovered his passion for preparing income tax returns while attending Rowan University when he volunteered with the IRS's Volunteer Income Tax Assistance (VITA) program. The VITA program offers basic tax preparation services for students, elderly, and other qualifying individuals. Upon graduating, Adam started working in public accounting for both individuals and businesses. Adam has worked with a wide variety of clients from the retired couple who is receiving Social Security income to the multi-million dollar corporations and everyone in between.

11/10/2021: **To be determined based on student interest/request**

11/17/2021: **To be determined based on student interest/request**