**When I’m 64: Financial Literacy Resources for Those Nearing and in Retirement Learner Guide**

<https://www.webjunction.org/events/webjunction/financial-literacy-near-retirement.html>

Patrons' financial interests and questions often highlight the complexity that an aging America faces as individuals transition to their golden years. Issues such as how much to save for retirement, protecting ourselves and our families from fraud, and helping loved ones manage their assets can be daunting for library staff tasked with directing patrons to reliable information. This webinar explores free resources provided by the Bureau of Consumer Financial Protection (formerly Consumer Financial Protection Bureau) that can help consumers navigate some of these complexities. You’ll also hear about programming and resources from the Kansas City Public Library that help patrons as they near their retirement years—valuable information for you and your patrons!

**Presented by:** Tamara Sieckman and Kim Gile

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| **What are your goals for viewing this webinar?** |  |
| **Personal Goals** |  |  |
| **Team Goals** |  |  |
| **Assessing Community Financial Literacy Needs for Older Adults** |  |
| Before you can begin to meet community financial literacy needs, you must explore the various levels of financial competencies and identify skills gaps. Assess the financial literacy knowledge gaps in your community, based on local or state information (e.g. National Financial Capability Study <http://www.usfinancialcapability.org/>) and consider/discuss opportunities for older adult patron learning in your community. Check those you’d like to prioritize in your next steps.* Managing Debt
* Planning for later-life financial security
* Understanding reverse mortgages
* Protecting older people from financial harm
* Financial knowledge and decision-making in later-life
* Help for financial caregivers handling the finances for others
* Living wills and trusts
* Understanding social security and Medicare/Medicaid
* Other
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| **Prioritizing Resources** |  |
| Explore the resources available through CFPB outlined in the webinar and in the related resources section on the event page ([https://www.webjunction.org/events/webjunction/financial-literacy-near-retirement.html#related\_resources](https://www.webjunction.org/events/webjunction/financial-literacy-near-retirement.html%23related_resources)). Identify those you would like to make available in print or via your library’s website, in a section dedicated to the financial literacy needs of your older patrons and their caregivers.1.
2.
3.
4.
5.
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| **Identifying Partners** |  |
| Review CFPB’s[**Community partnership guidebook for libraries**](https://s3.amazonaws.com/files.consumerfinance.gov/f/201406_cfpb_partner-guidebook.pdf) <https://s3.amazonaws.com/files.consumerfinance.gov/f/201406_cfpb_partner-guidebook.pdf> and beginning on page 12, use the **Program Planning Worksheet** to identify specific program needs and possible community partners. When you’ve identified a program and potential partner, use the **Program Partner Outreach Form** on page 15 to clarify roles and responsibilities. |  |
| **Designing Programs** |  |
| Design programs that are relevant to your community: What will you name the program so that it will appeal to your target community?How will you advertise your program?What social media channels or techniques will you use to promote?View the CFPB webinar, How to promote your financial education program (<https://youtu.be/wnmrpasV3wo>) to explore ways to promote your program in the community. |
| **Action Plan:** (include next steps, who, when, etc.) |
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