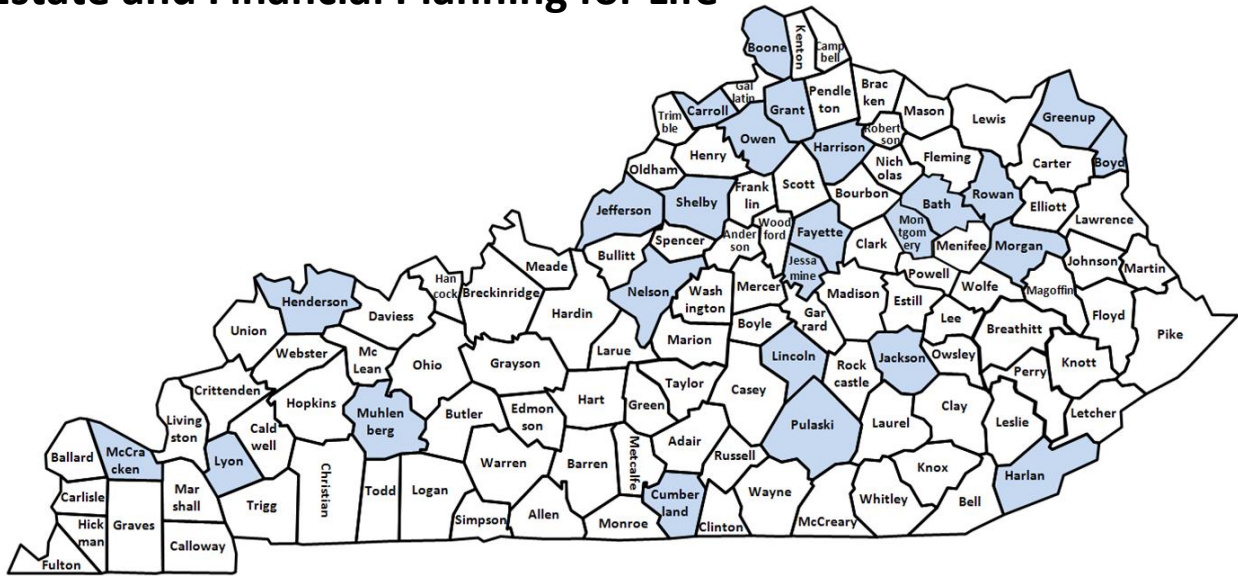


Estate and Financial Planning for Life



Middle and lower income Kentucky families are experiencing a financial crisis in part due to lack of financial awareness. In FY08, Extension offered the Estate and Financial Planning for Life program in 25 Kentucky counties with 1194 clientele participating. In the few months following the Estate and Financial Planning for Life Program 63% of those in attendance have now implemented a record keeping system to improve their knowledge of their personal financial status.

In the follow-up survey, 566 of the nearly 1200 have moved forward with their estate planning by obtaining a will, durable power of attorney or a health directive, 317 have enrolled in a retirement savings plan, and 394 have reported increasing their net worth as a result of actions taken in financial security that were recommended in the training.

Estate & Financial Planning for Life 25 Counties Reported Participating

1194 How many clientele participated in Estate and Financial Programming in your county this year?

As a result of attending Extension sponsored Estate and Financial Programming, how many participants reported:

- 755** implementing a record keeping system?
- 566** obtaining a will, durable power of attorney, or a health directive?
- 541** putting an estate planning team together?
- 317** enrolling in a retirement savings plan (either personally or at work)?
- 394** increasing their net worth?