

OneSource Launches Total Longevity Readiness Education Campaign, *“Learn to Live Well”*

OneSource for Longevity Readiness (OneSource), a 501c3 non-profit founded in 2014, announced the launch of its campaign to bring expert advisors and innovative programs to people to help them address the increasing financial, family and personal-wellness challenges of living longer in the 21st Century.

Research has proven that people can live longer and better if they; practice healthier living behaviors, can build financial security, and are more socially engaged (*). Through a combination of teaching, coaching, research, technology, and innovative learning programs, the campaign looks to help people develop longevity readiness plans for living well to 100+



Mr. Schloth, a co-founder and CEO of OneSource, stated, “The challenges of retiring have changed. Our goal is to teach people about how those changes affect them as they strive for a fun and prosperous retirement. The non-profit was founded because of aging-related experiences with loved ones and direct personal challenges faced by our founders. Since 2014, we have collaborated with educational institutions, held many group and private planning events across the nation. During that time, we designed a holistic approach to learning that we refer to as our “Total Longevity Readiness Planning Program.”

Mr. Schloth, continued “Thanks to our experienced educating volunteer planners and feedback from event participants, the program has evolved into four categories of Learning to Live Well;

1. **Learning How to Build Financial Security**, from planning for education costs, maximizing government benefits, paying for long term care to overall strategies to ensure we - **Don’t Outlive our Money!**
2. **Learning How to Enjoy Better Senior Living**, including, understanding senior housing and aging at home options to caregiver wellness and technology training
3. **Learning How to Be Safe and Secure**, including, understanding cyber-safety and physical security options to personal asset protection and estate planning
4. **Learning How to Improve Personal Wellness**, including, understanding physical and mental strategies for managing challenges, stress to better work-life balances

For more about the campaign, find a group educational event or schedule time with an expert longevity planning volunteer visit www.lifeplan123.org, call 203.344.3044 or email info@lifeplan123.org.

* Research reference – Stanford University’s Sightline’s Project - <http://longevity.stanford.edu/the-sightlines-project/>

About the Non-Profit (www.lifeplan123.org)

OneSource for Longevity Readiness, founded in 2014, is a privately funded 501c.3 non-profit organization dedicated to helping people enjoy the benefits of living longer through free education, innovative learning programs and technology advancement.

Your Local Chapter Contact:

_____, Longevity Planning Volunteer
 Phone: _____
 Email: ___@lifeplan123.org

National Help Desk:

Phone: 203.344.7044
 Email: info@lifeplan123.org

Are You Longevity Ready?

We Needed a Different Approach. Many of us will spend 30 years or more in retirement. Advancements in science and technology have allowed us to make better lifestyle decisions. With increased life expectancy, there is a clear need to expand traditional retirement planning to consider changes that go beyond tangible net worth. This is why we've expanded our research and educational programs to a Total Longevity Readiness Planning approach. It can't just be about individual advisors anymore, you need a team of trustable resource that will work together based upon your goals and objectives.

Through our local workshops, online webinars, innovative learn programs and technology tools we are helping improve the experience of aging. Our educational approach has evolved into four categories of Learning how to Live Well. Group educational sessions include;

EDUCATIONAL WORKSHOPS:

Ever Wonder What It Takes to Live to 100+ and Do it Well?

□ BUILDING FINANCIAL SECURITY

1. Surviving Retirement – Overall Planning
2. Demystifying Medicare and Social Security
3. Insurance & Paying for Long-Term Care
4. College Financing
5. Tax and Estate Planning
6. Business Ownership & Transitioning

□ PREPARING FOR SENIOR LIVING

1. Downsizing, Decluttering and Home Management
2. De-Mystifying Senior Housing Options
3. Aging in Place & Caring for the Caregiver
4. Embracing Technology to Enjoy the Aging Experience

□ PROTECTING YOURSELF AND YOUR ASSETS

1. Online Safety & Scam Awareness
2. Physical Security – Individual, Family & Business
3. Asset Protection – Eldercare Law, Trusts, Wills

□ BEING PERSONALLY WELL

1. Sound Mind, Strong Body & Solids
2. Community & Career Connections

Our Mission: Help people enjoy the benefits of living longer through better education and more innovation






Total Longevity Planning Tool.101: 11-Pt Longevity Readiness Report-Card






11-pt Longevity Readiness (LR) Comfort Scorecard				<i>(1-10 with 10 very comfortable)</i>	
Area #	LR Pts	Area of Concern	Planning & Strategies	Self-Grade	Why & What is The Plan to Improve
1	1	Building Financial Security	General Retirement Planning, Tax Strategy, Paying for Education & Long-Term Care		
	2	Building Financial Security	Leveraging Governmental Benefits – Medicare, Social Security, Medicaid, Veteran		
2	3	Better Senior Living	Aging at Home & Home-Care Options		
	4	Better Senior Living	Personal Challenges of Caregiving		
	5	Better Senior Living	Real Estate Transitioning & Management		
	6	Better Senior Living	Using Technology to Improve the Aging Experience		
3	7	Asset Protection	Legacy Planning, Wills, Trusts, Asset Titling, POA		
	8	Risk Management	Insurance Planning – Life, Health, Property, Casualty		
	9	Info Safety & Physical Security	Identify Theft		
4	10	Personal Longevity	Healthier Living Behaviors – Mind, Body, Goals		
	11	Work-Life Balance	Career Management and Life-Stage Income Options		

We encourage all to learn about the benefits of being a campaign sponsor, event host, group educator, individual longevity planner or volunteer advocate. Contact us at 203.344.7044 or tammy@lifeplan123.org






Total Longevity Planning Tool.201: Staged-Retirement Report-Card

Legend:  High priority advanced planning
 Transitional event  Lifestyle juncture






Pre-Retirement (50-64)

-  Retirement Budgeting (Grade __)
-  Estate Planning (Grade __)
-  Health, Life & LTC Insurance Assessment (Grade __)
-  Employment Alternatives (Grade __)
-  Social Security Optimization (Grade __)





Active Retirement (65-74)

-  Required Minimum Distribution (Grade __)
-  Medicare Enrollment/Management (Grade __)
-  Inheritance (Grade __)
-  Leisure & Travel Planning (Grade __)
-  Consolidating Personal Health Records (Grade __)

Stable-Retirement (74-84)

-  Establishing an Ethical Will (Grade __)
-  Understanding Future Care Options (Grade __)
-  Advance Healthcare Directives(Grade __)
-  Philanthropy/Volunteerism (Grade __)
-  Strategies for Staying at Home(Grade __)

Secure Retirement (85+)

-  Possible Assisted Living Options (Grade __)
-  Care Management & Advocacy (Grade __)
-  Transportation Services (Grade __)
-  Physical, Mental & Spiritual Wellness(Grade __)