

# How to Host a *When I'm 65* Screening & Conversation

*Whether you're 25 or 55, now is the time to plan for the future and start your journey to financial stability.*



As an organization, AFCPE® is dedicated to building the bridge to a more comprehensive and integrated continuum of care for financial services, ensuring that all people – regardless of age, income or background – can plan for a secure future. One way we do this is by building community - bridging the gaps between financial professionals and consumers.

**Your voice and participation matter!** As part of the *When I'm 65* conversation, you are raising awareness about the importance of financial security, and are helping to make a positive difference in your community by linking people to needed resources and professionals.

## What you'll need:

- Access to Detroit Public Television's **When I'm 65** documentary
  - Check your local PBS schedule: <http://www.wi65.org/georgia/>
  - Stream the video online from [www.wi65.org](http://www.wi65.org)
  - Use the **When I'm 65** DVD
- 1.5 - 2 hours
- A group of 8-10 people
  - Invite your neighbors, colleagues, family, or friends
  - Hosting a larger group? Consider breaking into smaller groups for more discussion time

## How to prepare:

- Preview the documentary
- Highlight key quotes from featured experts and other content from the documentary for discussion
- Download resources: <http://www.wi65.org/georgia/>
- Select a comfortable space
- Provide snacks and drinks for your guests
- Have paper and pens available for those who want to take notes

## Starting the Conversation:

- Allow your guests to introduce themselves
- Watch the documentary
- Utilize the data points and discussion questions below
- Allow time in the discussion for additional questions from the group members

## Discussion Questions:

1. What kinds of financial lessons did you learn growing up?
2. What messages are we passing on?

3. Do you consider yourself more of a spender or a saver?
4. We are bombarded with marketing messages about what to buy. How can we combat those messages and focusing on needs vs. wants to live within our means?
5. What role do systemic factors like race and gender play in the challenge of getting out of poverty, living debt-free, or saving for retirement?
6. What are the biggest financial challenges that derail efforts and good intentions to save?
7. How can technology play a role in helping people save?
8. What are the policy implications and solutions that would help solve these problems?

### Data Points:

- 42% of Georgia residents believe they are not adequately contributing to their retirement accounts.
- The survey also found that nearly one-fourth (23%) of Georgians have less than \$5,000 saved or invested for retirement (not counting home value).
- 28% of respondents do not have a retirement plan in place because they do not have enough money to save.
- 44% of women respondents are not currently planning for financial retirement.
- Over 50% of African American respondents don't feel they know enough information to make investments in retirement.
- 32% of White respondents said they have not started to plan for retirement because they plan to live off of Social Security or other financial resources.
- 48% of respondents feel that the cost of hiring a financial professional, such as an advisor or counselor, is too high.

### Creating action through conversation:

Have the group discuss:

- What personal actions group members will take to make change in their own lives?
- How group members can make change through advocacy on issues that impact financial security?

### Resources:

Connect group members with local resources and qualified, trusted professionals.

<http://www.wi65.org/georgia/>  
[www.iinvest.org/tools-resources/](http://www.iinvest.org/tools-resources/)  
[www.afcpe.org](http://www.afcpe.org)

<https://brokercheck.finra.org>  
[www.afcpe.org/find-an-afc](http://www.afcpe.org/find-an-afc)

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