

SAN DIEGO COMMUNITY COLLEGE DISTRICT  
COLLEGE OF CONTINUING EDUCATION  
COURSE OUTLINE

**SECTION I**

**SUBJECT AREA AND COURSE NUMBER**

INVS 500

**COURSE TITLE**

PREPARING FOR YOUR LATER YEARS

**ALTERNATE TITLE(S)**

LOOKING FORWARD TO AGING  
PLANNING YOUR RETIREMENT YEARS  
ESTATE PLANNING SURVEY TOPICS

**TYPE COURSE**

NON-FEE

OLDER ADULT

**CATALOG COURSE DESCRIPTION**

Students in this class survey topics related to the whole journey of aging including retirement considerations, independent and community living, advanced directives and coordinating health care, long-term care, and more. This class also provides an integrated overview and discussion on various topics such as overview of wills, trusts, and estate topics. This course introduces basic legal concepts, but, importantly, it is not a legal workshop and does not provide legal, investment, or related advice. Students have a chance to learn and discuss at a general level. (FT)

**LECTURE HOURS**

54-108

**LABORATORY HOURS**

**ADVISORIES**

NONE

**RECOMMENDED SKILL LEVEL**

NONE

**INSTITUTIONAL STUDENT LEARNING OUTCOMES**

1. Social Responsibility  
SDCCE students demonstrate interpersonal skills by learning and working cooperatively in a diverse environment.
2. Effective Communication  
SDCCE students demonstrate effective communication skills.

INSTITUTIONAL STUDENT LEARNING OUTCOMES (CONTINUED)

3. Critical Thinking  
SDCCE students critically process information, make decisions, and solve problems independently or cooperatively.
4. Personal and Professional Development  
SDCCE students pursue short-term and life-long learning goals, mastering necessary skills and using resource management and self-advocacy skills to cope with changing situations in their lives.

COURSE GOALS

1. Gain knowledge of estate planning topics
2. Develop awareness of topics related to aging and the retirement years.
3. Learn how to identify available resources and reputable assistance services.
4. Learn about basic information to assist students in using available resources.
5. Learn about the changes that occur during the aging process and how these changes may impact living arrangements and other needs.

COURSE OBJECTIVES

Upon completion of the course, the student will be able to:

1. Understand topics related to aging, estate preparation and planning.
2. Demonstrate a basic understanding of subject-related terminology. Understand basic concepts related to advanced directives, health care planning, wills and trusts.
3. Identify resources, including low-cost or free resources, available for continued learning.
4. Formulate a plan for future learning and communicating with a personal legal representative, social services, or medical representative for specific questions. Create a plan for building sustainable social, legal, medical, and financial support systems for aging and caregiving.

**SECTION II**

COURSE CONTENT AND SCOPE

1. Introduction and Considerations for the Golden Years
  - 1.1. Potential changes in later years
  - 1.2. Taking an Integrated Approach
  - 1.3. Discussing diverse approaches
2. Retirement and Evolving Expenses
  - 2.1. Health insurances and Medicare
  - 2.2. Long-term care expenses
  - 2.3. Expenses for necessities vs. leisure
  - 2.4. Unexpected health crises (e.g., cancer, etc.)
  - 2.5. Managing credit, assets, home equity, and other topics
3. Transportation Needs
  - 3.1. Driving and Exploring Alternatives
  - 3.2. Public transit and planning to walk

### COURSE CONTENT AND SCOPE (CONTINUED)

- 3.3. Available resources
- 4. Elder Care and Planning
  - 4.1. In-home assistance
  - 4.2. Independent and/or group living
- 5. Available resources Legal Considerations
  - 5.1. Health care care (Advanced health directives, coordinating care, etc.)
  - 5.2. Wills and trusts topics
  - 5.3. Organizing documents 5.4. Legal Aid Organizations and Public Referral Services
- 6. Long-Term Care and Options for End-of-Life Topics
  - 6.1. Hospice and Palliative Care
  - 6.2. Communicating Preferences to Health Providers, Family, and Friends

### APPROPRIATE READINGS

Reading assignments may include, but are not limited to, instructor prepared materials; and selected websites related to changes in later life; research articles; government notifications and literature related to available services for older adults.

### WRITING ASSIGNMENTS

Writing and response assignments may include, but are not limited to, the following:

- 1. Creating a plan to include all the components of retirement years.
- 2. Students may participate in online (written) discussions via email, Canvas, assignment platforms, and/or other type of course website (e.g., Google Sites).
- 3. Maintain a personal notebook or journal (hard copy or digital format).
- 4. Letter, blog, or other writings.

### OUTSIDE ASSIGNMENTS

Outside assignments may include, but are not limited to, activities such as reviewing selected course materials, extracurricular activities include observing or visiting government offices or other free services available to seniors. Additional assignments may include online research of any particular class topic and continued asynchronous learning through course website

### APPROPRIATE ASSIGNMENTS THAT DEMONSTRATE CRITICAL THINKING

Appropriate assignments that demonstrate critical thinking may include, but are not limited to

- 1. Planning next steps based on individual needs for successful and comfortable aging.
- 2. Contributing to a discussion with peers (in-person, virtually in real-time, or asynchronously).
- 3. Ability to identify, evaluate, and curate reliable resources for continued learning of class readings and assignments.

## EVALUATION

The student will:

1. Set goals and evaluate the achievement of these goals upon completion of the course.
2. Attend class regularly and participate in class activities (e.g., research, class discussion, writing assignments, etc).
3. Take quizzes and final examination.
4. Evaluate further resources and readings to demonstrate understanding.

## METHOD OF INSTRUCTION

Methods of instruction may include, but are not limited to:

1. Lecture/lab, demonstrations and presentations
2. Instructor feedback
3. Class discussions
4. Peer review
5. Field trips
6. Guest speakers,
7. Audio-visual presentations
8. Individual study

This course, or sections of this course, may be offered through distance education.

This course is designed with a focus on increasing equity and student success. Instructors adhere to the San Diego College of Continuing Education policies related to encouraging equity in courses in both in-person and online learning modalities. Instructors implement the principles of student equity by understanding identity and implicit bias in the classroom. Create engaging home pages, course outlines, course content, learning strategies, transparent assignments and quizzes, which are designed and implemented with equity in mind. Instructors include accessibility options for students with disabilities or others who prefer alternate format materials. Instructors create an inclusive and empowering learning environment for all students, be it online or in-person.

## TEXTS AND SUPPLIES

Instructors will supply web links to videos, articles, books, websites and/or apps for further learning which are appropriate to the course topics. All content will include increased accessibility options. Students will supply equipment as suggested in each course.

An outside reading list of current materials will be provided to students. Students are highly encouraged, but not required, to follow along with the book *Aging with a Plan*.

*Aging with a Plan* by Sharona Hoffman, J.D., LL.M., S.J.D., First Hill Books, current edition

Nolo's Encyclopedia of Everyday Law, by Shae Irving, J.D. and Nolo Editors, NOLO Publishing, current edition

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PREPARED BY Leona Plummer DATE July, 1982  
REVISED BY Instructional Services/SLO's Added DATE May 7, 2015  
REVISED BY Hayk (Harvey) Zeytuntsyan, Claudia Tornsäufer DATE March 1, 2023

Instructors must meet all requirements stated in Policy 3100 (Student Rights, Responsibilities and Administrative Due Process), and the Attendance Policy set forth in the Continuing Education Catalog.

REFERENCES:

San Diego Community College District Policy 3100  
California Community Colleges, Title 5, Section 55002  
Continuing Education Catalog