

**April 9, 2007**

**Proposal to Train  
Estate Planning Institute Group, LLC  
Best Practices for Serving Seniors**

The Estate Planning Institute Group, LLC has identified a need for skills enhancement to build successful relationships with their senior clients. Macomb Community College will provide the quality educational program and the experienced facilitators to ensure this goal is met quickly and cost effectively.

**Rationale for the Training**

Your employees' formal training and experience, which is likely focused on their primary work assignment, may not provide them with an understanding of the unique perspectives of older adults, nor the communication skills necessary to build strong, trusting relationships with their senior clients which are an important means of establishing long-term repeat business and referrals.

**Outcome of the Training**

Gaining specific training in the following areas will ensure these professionals gain new skills and increase their confidence and understanding of their clients needs in order to win new sales.

- Critical concepts for understanding our aging world
- How physical and mental changes as we age affect decision making
- Strategies for successful marketing to seniors

**Why Partner with Macomb?**

By partnering with Macomb Community College, you'll be assured of the most up-to-date training available in the area. Our over 50 years of experience in education attests to our ability to provide customized, specific training for your professionals. The Center for Continuing Education offers a variety of courses and expert faculty working in the field of gerontology, the study of aging.

Working closely with the Center for Continuing Education's Program Coordinator means your professionals will receive training that is directly applicable to your organization's needs. Training may be done at your work location or at one of our convenient campuses in Macomb County.

A sample of organizations Macomb's Center for Continuing Education has served in the past two years includes:

- Blue Cross Blue Shield of Michigan
- American House Retirement Communities
- C.A.M.P. Home Health Care
- Campbell – Ewald

We will be glad to provide the names and telephone numbers of contacts at these companies who will attest to the quality of our training programs.

This 8-hour seminar, created especially for Estate Planning Institute Group, LLC, can be delivered to professionals as follows:

<b>Available Dates</b>	Friday, August 3, 2007
<b>Time</b>	8 a.m. – 12 noon and 1 p.m. – 5 p.m.
<b>Number of Participants</b>	up to 30 at Macomb, more at your location
<b>Cost</b>	\$2,500
<b>Materials</b>	Each participant will receive a comprehensive workshop manual that can be used as a reference tool.

### **Seminar Outline**

In three modules, the participants will learn to:

1. Understand critical concepts for understanding our aging world
  - A. The Age Wave
  - B. Current and future issues in aging
  - C. Aging in America vs. other countries
  - D. Older American's Act, older adult service network, long-term care, aging-in-place and livable communities
  - E. Debunking myths and stereotypes
  - F. Social and emotional losses
  
2. Understand how physical and mental changes affect decision making
  - A. Normal aging and dementia related illnesses
  - B. Aging simulation exercises
  
3. Understand strategies for successful marketing to seniors
  - A. Seniors vs. boomers – the changing demographic
  - B. Do's and don'ts of communicating with seniors
  - C. Telephone techniques
  - D. Environmental concerns
  - E. Marketing your message

## **Macomb Faculty**

**Midge Appel**, BS, MA brings her more than 20 years of experience in the field of gerontology to her seminars. She is an adjunct faculty on many topics for both Macomb College and Oakland Community College.

In addition to teaching at both Macomb College and Rochester College, instructor **Karen Bisdorf**, BS, MSA also brings years of experience as Assistant Director of the Macomb County Senior Citizen's Services. Karen brings insight into the aging market from both the theoretical and practical perspectives.

**Michelle Valin**, Macomb Center for Continuing Education's Certified Program Coordinator, will work closely with your representative to ensure the training meets all your requirements.

## **Macomb Community College Responsibilities**

We will provide you with the following:

- A formal training agreement that you may sign and return to us
- A list of the instructor's audiovisual requirements if held off-campus
- Certificates of completion for each participant who registers for this course

## **Estate Planning Institute Group, LLC, Responsibilities**

If possible, we would appreciate your providing Ms. Valin, within 24 hours before the scheduled training date, a complete listing of the participants, so that we may register them as students of the college, and issue continuing education units and certificates. If this is not possible, we can issue and collect the registrations from the participants during the training, but certificates will not be issued until after the college receives the proper forms. Forms will be emailed to your representative after a contact is signed.

Registration forms including the following:

- Name
- Address
- Telephone number
- Email address
- Date of Birth OR Social security number
- Section number and sponsorship affiliate (provided by Macomb)

**Contract Deadline and Payments**

This proposal is effective until June 1, 2007. If you would like to propose a new training date, please give Macomb one week to confirm new date with faculty.

Payment may be made at the time service is rendered, or we can invoice Estate Planning Institute Group, LLC, with payment due at time of receipt. Checks may be made payable to Macomb Community College and mailed in care of:

Macomb Community College  
Center for Continuing Education  
14500 E. 12 Mile Road.  
Warren, MI 48088

Please call Michelle Valin at 586-498-4006 to confirm your final requirements. We're pleased to be able to serve you.