**Meet Bob and Mary…**

Bob and Mary are in their early 70’s and have been married for 52 years. They are physically active and healthy.

Before retiring, Bob worked full-time covering the family under his employer’s insurance and always took care of the finances. Mary didn’t need to work, but did work part-time after the kids were grown because it gave her a sense of purpose. She has been happy letting Bob take care of the finances. Bob and Mary have had surface level conversations about end of life planning, but haven’t done much yet.

Bob suffers a stroke. Bob’s stroke is not fatal, but the prognosis is tentative if he will make a full recovery. Mary has never had to manage the finances and is unsure of where records are kept, what bills have to be paid, what was done online and where the passwords are kept.

Their adult kids want to help but can only do so much with the information they have.

**Directions: After reading the scenario about Bob and Mary, discuss the following questions in pairs or small groups of 3 or 4**.

1. What are some things Mary should consider doing about their finances in the near future?

2. What could Bob and Mary have done to prevent this from happening?