

## FINANCIAL PLANNING for TRAVEL (Seniors & Retirees) Syllabus

Wednesdays, 1pm - 2:30pm PST, SUMMER Semester

Virtual via Zoom

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### Course Description

This virtual class offers an overview of travel in retirement, highlighting its benefits like health, fulfillment, and social connections. It focuses on setting personalized travel goals with an emphasis on safety, comfort, and peace of mind. Attendees will explore different travel types, affordability strategies, and budgeting on a fixed income. Interactive sessions, Q&As with an insurance expert, and practical tools like checklists and budgeting templates will help participants create a tailored retirement travel plan.

Week	Topic	Notes
Week 1 / 5-27-2026	Week 1 Topic: Introduction/Defining Retirement Travel Goals	
Week 2 / 6-3-2026	Week 2 Topic: Budgeting On a Fixed or Limited Income	
Week 3 / 6-10-2026	Week 3 Topic: Smart Saving & Funding Strategies	
Week 4 / 6-17-2026	Week 4 Topic: Discounts, Deals & Travel Perks for Seniors	
Week 5 / 6-24-2026	Week 5 Topic: Healthcare & Travel Insurance	
Week 6 / 7-1-2026	Week 6 Topic: Managing Money Safely While Travelling	
Week 7 / 7-8-2026	Week 7 Topic: Planning for Accessibility & Comfort	
Week 8 / 7-15-2026	Week 8 Topic: Long-Term & Seasonal Travel	
Week 9 / 7-22-2026	Week 9 Topic: Estate & Financial Protection Considerations	
Week 10 / 7-29-2026	Week 10 Topic: Post-Trip Financial Check-in & Final Project	

\*Content/order/classes/speakers subject to change if necessary.