

# TIPS FOR UPCOMING VETERAN'S FINANCIAL LITERACY PROGRAM

## Saturday, October 30, 2021

Thank You Very Much for Your Participation in the Veteran's Financial Literacy Program.

The information below will assist you in preparing for the upcoming event:

### THINGS TO DO BEFORE THE EVENT

You should review the following materials to get you ready for the event:

- Got Money Problems 2021 BLS Veterans' Project PowerPoint;
- Veteran Mental Health Competency PowerPoint; and
- Bankruptcy Basics Video

These three tools will arm you with all the information you will need for the event.

***You will qualify for CLE credits if you watch either one of the videos and complete a counseling session. If you watch both videos you will be entitled to CLE credits for watching each video. You will still only need to complete one counseling session to get the CLE credits. We strongly urge you to watch the Mental Health Video if you have not previously worked with Veterans.***

### WHAT YOU WILL NEED TO KNOW FOR THE DATE OF THE EVENT

1. On the day of the event, you will receive an email with your client assignment and a fillable notes information form. The form looks like this:

<p>LEGAL SERVICES OF GREATER MIAMI, INC. VETERANS PRO BONO CLINIC <u>CASE OUTLINE</u></p>	
Client Name:	_____
Legal Issue:	_____
Important Case Facts and Advice:	_____ _____ _____ _____ _____ _____ _____
Do you believe the client needs extended further legal service? (explain):	_____ _____ _____ _____ _____
Other comments:	_____ _____ _____
Name of Attorney Providing Advice	_____
Date	_____

**IMPORTANT:** You MUST complete the fillable notes form so that there is appropriate documentation.

2. Be on time for the event. If you plan to attend the in-person component, make sure to arrive a few minutes earlier to mingle and introduce yourself to the legal aid staff on site.
3. When breaking up for the one-on-one sessions, make sure you are meeting with the assigned client.
4. When meeting with the client, please remember to:
  - a. Engage the client, and actively listen.
  - b. Identify the legal issues, which **MUST** be limited to the scope of the Veterans' Financial Literacy Program.
  - c. Do not promise extended representation beyond the issues of the program itself.
  - d. If you are interested in assisting the veteran after the one-on-one session, please make the appropriate notes in the notes information form that you are provided in your client assignment email.
5. When you are finished with your client session(s), please remember to date and sign your name on the form provided to you where indicated. **MAKE SURE** to send your signed fillable notes by **replying to ALL** to the original email you received with your client assignment.

**IMPORTANT:** Following this instruction is crucial because it will ensure that your notes are properly documented in the correct client database portal, and will also enable legal services to credit your pro bono time.

6. Clients who have additional legal issues outside the scope of the program should contact the appropriate Legal Aid provider:

**Miami-Dade**

Legal Services of Greater Miami: (305) 576-0080  
Mission United Miami: [\(305\) 646-7130](tel:3056467130).

**Broward**

Broward Legal Aid: (954) 765-8950  
Broward Mission United: 954.4.United

**THANK YOU FOR YOUR TIME!!**