ITSYOURMONEYANDESTATE.org

24033 El Toro Road, Suite 130, Laguna Hills, CA 92653

IT'S YOUR MONEY! AND IT'S YOUR ESTATE!

Spring 2018 Workshop Series

Workshop community	Moderators	Contact
Orange County	Peter Kote Trevor Murphy Richard Huntington	Pete@ItsYourMoneyAndEstate.org Trevor@ItsYourMoneyAndEstate.org Huntingtonjr@msn.com

It's Your Money	WEEK	It's Your Estate
Introduction and New Tax Law	**1**	Introduction and New Tax Law
Annuities and Mutual Funds	**2**	Estate Planning Basics
Financial Planning I	**3**	Planning for Incapacity
Financial Planning II	**4**	Living Trusts
Medical Care Planning	**5**	Tax Planning Issues
Equity Investing	**6**	Retirement Plan Distributions
Fixed Income Investing	**7**	The Trustee and Executor
The Big Takeaway	**8**	Case Study and Review

Charitable Sponsors: American Heart Association, Chapman University, CHOC Children's Foundation, Financial & Estate Literacy, In Defense of Animals, Laguna Canyon Foundation, Mission Hospital Foundation, Orange Coast College Foundation, Pacific Symphony, St. Jude Memorial Foundation, Susan G. Komen® Orange County, and United Way of Orange County.

City	Workshop	Venue	Day and Time
Newport Beach 949-548-2411	"It's Your Estate!"	Newport Beach Central Library 1000 Avocado Street	Mondays, April 2– May 21 10:00 AM to 11:30 AM
04-02-18	Introduction and New Tax Law		Peter Kote & Mark Prendergast
04-09-18	Estate Planning Basics		Rod Stern
04-16-18	Planning for Incapacity		Susan Katzen
04-23-18	Living Trusts		James Leese
04-30-18	Charitable Income & Tax Planning Issues		Bonnie Hayden & Carl Wayne
05-07-18	IRA & Retirement Plan Distributions		Michael Simon
05-14-18	The Role of a Trustee & Executor		Peter Kote
05-21-18	Case Study/Review		Peter Kote & Steve Bemis
Orange 714-288-2470	"It's Your Money!"	Orange Public Library 407 East Chapman Avenue	Tuesdays, April 10 - May 29 9:30 AM to 11:00 AM
04-10-18	Introduction and New Tax Law		Peter Kote & Gina Chironis
04-17-18	Annuities & Mutual Funds		Peter Kote & Neal Rutter
04-24-18	Financial Planning I		Patricia Parker
05-01-18	Financial Planning II		Patricia Parker
05-08-18	Medical Care Planning		Lee-Anne Godfrey
05-15-18	Fixed Income Investing		Scott Anderson
05-22-18	Equity Investing		Mark Hebner
05-29-18	The Big Take Away (contest)		Peter Kote & Patrick Stark

Laguna Niguel 949-425-5151	"It's Your Money!"	Sea Country Center 24602 Aliso Creek Road	Tuesdays, April 10 – May 29 1:00 PM to 2:30 PM
04-10-18	Introduction and New Tax Law		Richard Huntington & Marty McNamara
04-17-18	Annuities & Mutual Funds		Neal Rutter & Richard Huntington
04-24-18	Financial Planning I		William Cuthbertson
05-01-18	Financial Planning II		William Cuthbertson
05-08-18	Medical Care Planning		Lee-Anne Godfrey
05-15-18	Fixed income Investing		Mark Wilson
05-22-18	Equity Investing		Ashley Bleckner
05-29-18	The Big Take Away (contest)		Richard Huntington& Meghan Coolbaugh

Brea 714-990-7751	"It's Your Money!"	Brea Senior Center 500 Sievers Avenue	Tuesdays, April 3 – May 22 1:30 PM to 3:00 PM
04-03-18	Introduction and New Tax Law		Trevor Murphy & Robert McDaniel
04-10-18	Annuities & Mutual Funds		Peter Kote
04-17-18	Financial Planning I		George McDaniel
04-24-18	Financial Planning II		George McDaniel
05-01-18	Medical Care Planning		Debbie Beatty
05-08-18	Fixed income Investing		Jayce Lowe
05-15-18	Equity Investing		Michael Verity
05-22-18	The Big Take Away (contest)		Peter Kote & Carl Lachman

Fullerton 714-738-6305	"It's Your Estate!"	Fullerton Community Center 340 W Commonwealth Avenue Grand Hall A & B	Wednesdays, April 4 – May 23 2:00 PM to 3:30 PM
04-04-18	Introduction and New Tax Law		Peter Kote, Carl Lachman and Michael Giangrande
04-11-18	Estate Planning Basics		Barbara Dibble
04-18-18	Planning for Incapacity		Priscilla A. Madrid
04-25-18	Living Trust		Shauna Anderson
05-02-18	Charitable Income & Tax Planning Issues		Tony Truong
05-09-18	IRA & Retirement Plan Distributions		Greg Anderson
05-16-18	The Role of a Trustee & Executor		Darin Barber
05-23-18	Case Study/Review		Peter Kote and Carl Lachman

Mission Viejo 949-470-3062	"It's Your Estate"	Norman P. Murray Senior Center 24932 Veterans Way	Thursdays, April 5 – May 24 10:00 AM to 11:30 AM
04-05-18	Introduction and New Tax Law		Richard Huntington & Marty McNamara
04-12-18	Estate Planning Basics		Noelle Minto
04-19-18	Planning for Incapacity		Eric Becker
04-26-18	Living Trust		Fred Muscarella
05-03-18	Charitable Income & Tax Planning Issues		David Moore
05-10-18	IRA & Retirement Plan Distributions		Stephanie Winsted
05-17-18	The Role of a Trustee & Executor		Brian Bissell & Richard Huntington
05-24-18	Case Study/Review		Richard Huntington & Tim Pickart

Irvine 949-724-7300	"It's Your Estate!"	Trabuco Center 5701 Trabuco Road	Thursdays, April 5 – May 24 1:00 PM to 2:30 PM
04-05-18	Introduction and New Tax Law		Peter Kote & Marty McNamara
04-12-18	Estate Planning Basics		Sophia Sakamoto
04-19-18	Planning for Incapacity		Eric Becker
04-26-18	Living Trusts		Leslie Daff
05-03-18	Charitable Income & Tax Planning Issues		David Moore & Lindsey Jacobs
05-10-18	IRA & Retirement Plan Distributions		Daryl Miller
05-17-18	The Role of the Trustee & Executor		Trevor Murphy & Karen Haugen
05-24-18	Case Study/Review		Murphy & Steve Giammichele

Costa Mesa 714-432-5707	"It's Your Estate"	Orange Coast Community College Student Center Classroom 2701 Fairview Road	Fridays, April 6 – May 25 10:00 AM to 11:30 AM
04-06-18	Introduction and New Tax Law		Pete Kote & Mark Prendergast
04-13-18	Estate Planning Basics		Darlynn Morgan
04-20-18	Planning for Incapacity		Carl Wayne
04-27-18	Living Trust		Danielle Guerrero
05-04-18	Charitable Income & tax Planning Issues		Bonnie Hayden
05-11-18	IRA & Retirement Plan Distributions		Michael Simon
05-18-18	The Role of a Trustee & Executor		Trevor Murphy & Shelly O'Byrne
05-25-18	Case Study/Review		Murphy & Steve Giammichele

Laguna Beach 949-715-8105	"It's Your Money!"	Laguna Beach Senior Center 380 Third Street	Fridays, April 6 – May 25 1:30 PM to 3:00 PM
04-06-18	Introduction and New Tax Law		Peter Kote & Gina Chironis
04-13-18	Annuities & Mutual Funds		Peter Kote & Neal Rutter
04-20-18	Financial Planning I		Laura Tarbox
04-27-18	Financial Planning II		Laura Tarbox
05-04-18	Medical Care Planning		Lee-Anne Godfrey
05-11-18	Fixed Income Investing		Mike Nozzarella
05-18-18	Equity Investing		Jonathan Chin
05-25-18	The Big Take Away (contest)		Neal Rutter & Meghan Coolbaugh

About our Workshops

No commercial or for-profit sponsors; No speaker will receive attendees' name, address or phone number; No financial or insurance product will be sold; No charity will solicit you for a donation.

It's Your Money

The "It's Your Money!" sessions cover the business of money; 12 hours of objective education over an 8 week period. Our instructors are local FEE ONLY financial advisors who all act in a fiduciary capacity with their clients. None of our speakers are licensed to sell any financial products. You will learn how they charge and the steps you need to take on your financial plan with or without a professional.

It's Your Estate

The "It's Your Estate!" sessions cover all the legal documents you will need to set up an estate plan using a variety of local Orange County estate planning attorneys as instructors. We provide 12 hours of objective education over an 8 week period, 1 ½ hours per week. Each attorney explains their fees in detail and they do not receive your contact information.

Financial & Estate Literacy, Inc.

Mission

To prevent financial abuse by educating individuals to take control of their financial, estate, and charitable giving decisions.

Purpose

We are a not-for-profit organization with a focus on financial and estate planning education. Most public workshops are about selling and we focus on ***what is in a person's best interest****. We encourage tax-wise charitable giving that reflect your core values and believe that it is good to give. Research has shown that giving is good for you!*

Origin

Peter Kote, founder of the workshop series and former charitable planning specialist, started with a simple idea: if people knew more about money and estate planning, a greater percentage of individuals would be willing to make a gif through their estate plan.

After teaching the program to faculty members at Long Beach State University, Peter recognized the overwhelming need for unbiased financial planning education. Since its fruition, the workshops have grown in size and popularity. In 2008, Peter won the Financial Planning Association's "Heart of Financial Planning Distinguished Service Award" for the Orange County workshops. As of October 2012 the workshop series has officially incorporated as a nonprofit – Financial & Estate Literacy. You can look us up on https://www.guidestar.org as well as other charities.

For more information, please contact Trevor Murphy, President & CEO of Financial & Estate Literacy or ItsYourMoneyAndEstate.org

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